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ABSTRACT

During the past several years a number of studies and subsequent reports have been issued which addressed specific needs in the area of management for schools in the District of Columbia. All of the reports cited here--the Passow, Nelsen Committee, Price-Waterhouse, and Management Review Reports--identified areas of deficiency in the managerial operation of the school system and made sweeping recommendations for reorganization. The reorganization structure presented as part of this package defines the basic organizational structures needed in each area from which services emanate. Implementation is meant to cut red tape and reduce reaction time, provide service where none presently exists, eliminate manual operations that can be automated, and anticipate system growth by providing pertinent data bases and bases for decisionmaking. (WM)

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REORGANIZATION OF MANAGEMENT SERVICES

SUBMITTED TO

THE BOARD OF EDUCATION
PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

PREPARED BY

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Deputy Superintendent

May 1974

Barbara A. Sizemore
Superintendent

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INTRODUCTION

The District of Columbia Public Schools is a $200,000,000 enterprise operated with funding provided for a base budget through District of Columbia levied taxes, Congressional appropriations and funds provided from sundry federal grants.

During the past several years a number of studies and subsequent reports have been issued which addressed specific needs in the area of management.

All of the reports identified areas of deficiency in the managerial operation of the school system and made sweeping recommendations for reorganization of the managerial processes in order to provide efficiency of operation, reliable fiscal data, effective financial control and needed support operations for the effective operation of the instructional program, the school system in general, and a basis for decision making.

In the Superintendent's 120-Day Report, it was indicated that the Deputy Superintendent of Management Services had undertaken a comprehensive review of the existing management organization with a view to realigning the limited resources presently available in order to move toward implementing some of the stated goals.

This report is to fulfill that obligation.

PART I

STUDIES AND REPORTS
FOR
PROPOSED MANAGERIAL IMPROVEMENTS

THE REPORTS

The District of Columbia Public Schools have been studied over the years with the area of management being given significant attention in the Passow Report, issued in 1967; The Executive Study Group Report, issued in 1969; the Nelsen Commission Report, issued in 1971; the Management Review Report, issued in 1971; and the Price-Waterhouse Report, issued in 1972.

THE PASSOW AND EXECUTIVE STUDY GROUP REPORTS

The Passow Study was conducted at the invitation of the Superintendent of Schools and the Board of Education which called for a comprehensive study of the Public Schools of the District of Columbia by the Teachers College, Columbia University of New York.

The study began in the school year 1965-66 and the Passow Report was issued in May, 1966. The report contained many recommendations -- major and minor, short and long range -- to bring about change throughout the system.

Its recommendations included updating personnel procedures, improvement in teacher recruitment, selection and retention, separation of certification from employment, reorganization of the central office, and the position of Executive Deputy Superintendent of Schools as the Superintendent's chief staff officer with a span of control that would permit effective management.

The Executive Study Group Report was issued in 1969 as a follow-up to the Passow Report. This report reviewed the recommendation of the Passow Report and re-stressed the needs for implementation of the recommendations of the Passow Report.

The Executive Study Group existed as a result of the structure created by the Board of Education to involve both the professional and general communities in the evaluation of the proposals made in the Columbia University (Passow) Reports.

THE NELSEN REPORT

The report was commissioned by the United States Congress in September, 1970 to review the operation of the entire District of Columbia Government. The report was sweeping in its examination of the City government and all of its departments and related agencies.

The report issued in August, 1972 gave wide-ranging recommendations for the organizational and operational structure of the City Government as well as far-reaching recommendations for the District of Columbia Public Schools. Within the body of recommendations for the Public Schools, recommendations were given for the improvement of the management functions of the school system.

The recommendations which related specifically to the area of management are:

- A position of Deputy Superintendent for Business Management be established, with status equal to that of the Deputy Superintendent for Instruction, to administer all personnel, financial, business management, administrative services, general support, and internal security activities.

- A position of Comptroller be established under the Deputy Superintendent for Business Management to provide: (1) effective control over all appropriated and Federal grant-in-aid funds, (2) improved coordination and integration of the budget, accounting, and management analysis functions, and (3) automatic data processing services for the entire school system.

- Establish the Office of Federal Programs, with responsibility limited to interfacing between the administration and the U. S. Office of Education and other Federal agencies.

- Establish the Office of Audit and Investigations, with responsibility for investigating and reporting on a regular basis on the fiscal integrity of the operations of the public schools organization and its compliance with statutory and regulatory requirements, and on all allegations of misconduct on the part of employees.

- The Board of Education and the Superintendent of Schools revise the activity structure of the schools' budget to reflect the resources invested in each teaching activity, thus making the budget a more

valuable tool for planning the use of resources and measuring the results achieved.

- The Superintendent of Schools, with the concurrence of the Board of Education, develop and follow a timetable for the preparation of the Fiscal Year 1974 budget that will permit more meaningful participation and deliberation in the budget formulation process by the Board of Education and the other parties concerned, and will meet the Mayor-Commissioner's deadlines for the submission of budget requests.

- Design and install a management information system that will store and provide, upon demand, data needed for: (1) the planning, execution and assessment of programs, and (2) the preparation of replies to inquiries regarding the status of pupils, staff, programs and other important school operations.

- If the Board of Education proceeds with its intention of more extensively involving local schools and their communities in the budget development process, it will do so contingent upon any

additional costs resulting from this approach being absorbed within existing budget levels and its ability to administer the new system effectively.

- The Superintendent provide for a comprehensive examination of all operations covered by the base budget of the school system to: (1) examine the need for each position, filled and vacant; (2) determine how available resources could be better deployed or utilized to achieve improved education for the District's school children; and (3) make findings and recommendations, as appropriate, for revisions in staffing.

- The schools' administration develop and institute at the earliest possible date an effective position control system that can be maintained on a continuing basis at a minimum cost and will afford the Superintendent and the Board of Education the opportunity to: (1) know where positions are assigned and periodically to review positions, authorized and vacant; and (2) make judgments as to the most effective potential use of available authorized positions.

- The Board of Education establish a separate office with sole responsibility for handling all teacher certification and the accreditation of educational institutions, and that the Superintendent of Schools assign responsibility for determining the eligibility of certified applicants to the Personnel Department with appropriate assistance from principals and subject-matter specialists.

- That the Superintendent of Schools transfer the Staff Development Office in the Office of the Deputy Superintendent to a newly established staff development and training unit in the Schools' Personnel Department which will have responsibility for training functions currently handled by the Recruitment Section.

- That the Superintendent of Schools establish a separate employment office within the Schools' Personnel Department to coordinate and control the hiring of all employees, and that new office space with ready public access be provided it.

- That the Associate Superintendent for Personnel Services develop by December 31, 1972, a detailed action plan for centralizing the preparation of all personnel actions, and forward the plan to the Superintendent of Schools for approval.

- That the Associate Superintendent for Personnel Services, with assistance and advice from the Associate Superintendent for Business Management, secure suitable office space to provide for the consolidation of all employee hiring activities.

- That the Board of Education establish an Office of Safety Management in the Personnel Department, and that this office establish and administer a safety management program compatible with the program administered by the Central Personnel Office and set forth in the District Personnel Manual.

- That the Board of Education and the Superintendent of Schools, in conjunction with the District Personnel Office and Corporation Counsel, develop and submit to Congress an appropriate amendment to the Teachers' Salary Act to provide within-grade

salary increases or other appropriate incentives for teachers and school officers performing at an outstanding level based on validated performance measures.

- That the Superintendent of Schools direct the Associate Superintendent of Schools to develop a performance information system for all teachers for implementation, on a trial basis in the 1972-73 school year; and on the basis of preliminary results, as well as advice and comments from appropriate school officials and teacher representatives, to implement a comprehensive performance information system for the 1973-74 academic year.

- That the Board of Education, with assistance from the District Personnel Office and the Corporation Counsel, submit to Congress proposed legislation which will more strictly define the managerial and administrative positions to be included in the Teachers' Salary Act, with the objective of eliminating positions not directly involved in the educational process from the Teachers' Salary Act and allowing pre-professional teaching employees to be paid under the Teachers' Salary Act.

- That the Board of Education and the Superintendent of Schools revise the procedures for the selection of school principals so as to replace the representative from the Board of Education with the Associate Superintendent of Personnel on the selection panel.

- That the Board of Education and the Superintendent of Schools develop and approve new procedures for the selection of assistant principals, to provide for community input in establishing eligible lists and to give a school principal authority to recommend his or her preference for the position to the Superintendent of Schools.

- That the Superintendent of Schools establish selection panels comprised of school principals to evaluate all prospective teachers, and that the panels be required to establish ranked eligible lists to govern all appointments of new teachers.

- That the Board of Education, with appropriate assistance from the pay and classification specialists in the Central Personnel Office, submit to the Congress revisions in the Teachers' Salary Act that will eliminate specific positions from classification under the Act and will seek materially to reduce the number of salary classes 3 through 14. (D. C. Code, Sec. 31-1501).

- That the Superintendent of Schools direct the Associate Superintendent for Personnel Services to develop a proposed executive development program with the objective of identifying the executive potential of current employees, including those already in executive positions, and on the basis of identified needs, to develop appropriate training opportunities.

- That the Superintendent of Schools direct the Associate Superintendent for Personnel Services to develop a performance information system for school principals and assistant principals for full implementation during the 1973-74 school year.

- That the Board of Education, using as its basis the performance information system for school principals and assistant principals to be developed by the Associate Superintendent for Personnel Services, establish policies and procedures to eliminate tenure in all administrative positions but allow administrative employees to retain tenure in teaching positions.

- That the Associate Superintendent for Personnel Services develop, by December 31, 1972, an outline of an orientation course for all new employees and submit a detailed training schedule for the orientation to the Superintendent of Schools for approval.

- That the Associate Superintendent for Personnel Services develop, by December 31, 1972, an outline of an orientation course for all new employees and submit a detailed training schedule for the orientation to the Superintendent of Schools for approval.

- That the Associate Superintendent for Personnel Services issue rules and regulations requiring all program managers and school principals to document future administrative, professional and clerical manpower needs one, three, and five years in advance.

THE MANAGEMENT REVIEW REPORT

The Management Review Report was issued in 1971. The Report was cooperatively arranged and conducted by the U. S. Office of Education and the District of Columbia Public Schools. The primary purpose of the management review was to assist the District of Columbia Public Schools in strengthening the management of federally supported programs.

The following recommendations were given for the improvement of the management of federally supported programs:

- That a mechanism be developed by the Department of Federal Programs that will insure the coordination of such related programs as ESEA, Titles I, II, III, VI, and NDEA, Title III, so that they become mutually supportive, economizing on resources and eliminating duplication.

- That an evaluation plan for all Federal Programs be implemented on a regular basis, so that projects under Federal Programs can be directed to meet assessed needs.

- That a Management Data Book be developed and published monthly for the Superintendent and Staff.

- An inventory of all objective data currently collected be prepared and analyzed on a regular basis to determine their decision-making value and weaknesses or inadequacies in the system in order to take appropriate strengthening action. A central forms control unit should be established to develop procedures for coordinating and monitoring all data collecting efforts for the department.

- The departments' information system incorporate all existing sub-systems, both automated and manual, into an integrated system that meets multiple information needs from a common data bank.

- A general summarized listing be prepared of all data presently being collected and disseminated throughout the entire department.

- The agency consider consolidating under the Division of Personnel Services all personnel functions dealing with the central administration staff.

- Where feasible, that employees in other divisions currently performing personnel tasks; and thereby having acquired specialized skills in some aspect of personnel work, be transferred to the Division of

Personnel Services where their strengths can be fully utilized.

- The agency review the recent compilation of all personnel policies to determine which policies are adequate and which ones are obsolete. Current policies and procedures should be improved where appropriate and new policies should be developed in areas where policy statements are lacking.

- The agency develop a formalized procedure for making staffing projections. Planning for future personnel needs should become a part of the agency's total planning process.

- The agency move as rapidly as it can in automating personnel records. The study made by the System Development Corporation might be evaluated, updated, and if desirable, implemented.

- The rules and responsibilities of all central administration staff members be reviewed. An agency-wide job classification survey should be undertaken to insure proper classification of all jobs related to central administration.

- A study be made of salaries paid non-professional employees in the agency as compared to salaries paid employees in similar positions in private industry and other governmental jurisdictions.

- Written policies be developed to strengthen communications between supervisors and employees and among departments.

- That the responsibility for budget formulation, fund allocation, accounting for and controlling be assigned to one division, along with position control and payroll.

- That when Federal Program projects are initiated, fiscal, personnel and procurement staff should be involved, and should continue to be involved in appropriate stages of project review, monitoring and reporting. Sufficient administrative staff should be employed to handle the workload imposed by Federal programs. The Federal Program Officer should restudy the positions related to Federal programs and make determinations concerning needed changes, in both administrative and program positions.

- That a fireproof vault be constructed or purchased for storing computer reels and tapes. A duplicate set of files and records should be maintained at an alternate location in case of fire or other disaster.

- That a Department of Teacher Education Certification and School Accreditation, structured with one section for each of these areas, be established.

- That the agency develop policy statements on recruitment.

- That the agency develop policy statements and related guidelines for equal employment opportunities of central administration personnel.

- That the agency continue the awards program for non-professional employees and extend it to include professional and Wage Board personnel.

- That an agency-wide orientation program be developed for all new employees on the central administration staff.

- That the agency continue to work closely with the U. S. Civil Service Commission in an effort to

develop more effective performance-based evaluation instruments for use with personnel in General Service positions. It is further recommended that the agency consider establishing an on-going evaluation program for all central administration personnel.

- That the Associate Superintendent for Personnel Services be delegated responsibility for planning and coordinating all staff development activities in the agency, particularly those activities which relate directly to the central administration staff.

- That a written grievance procedure be established to provide central administration staff members an opportunity to appeal to a grievance committee when difficult problems cannot be solved informally.

- That workshops be conducted for administrators and supervisory personnel regarding the agency disciplinary policy and procedures.

- The creation of a Management Analysis and Review Section in the Division of Budget and Executive Management.

- Establish a revolving account for procurement.
- Establish an automated equipment inventory information system.
- That an internal audit function be established.

THE PRICE-WATERHOUSE REPORT

The Price-Waterhouse Report was the result of a study commissioned by the Board of Education for the performance of a study of the management support systems of the District of Columbia Public Schools.

The study which culminated in the issuance of the report covered major recommendations for the structuring of a management apparatus to effectively serve the needs of the District of Columbia Public School System.

Personnel involved in the study and implementation of some of the recommendations were experts in the business arena and were drawn, on loan, from industrial, management, accounting and consulting firms of the greater Washington area.

The study proceeded under the sponsorship of the Washington Board of Trade, resulting in the following recommendations:

- Establish a Deputy Superintendent for Management Services
- Implement an automated control system
- Establish a financial reporting unit, upgrade financial planning and control, and reorganize the business-related departments

- Revise accounting codes which identify schools, allotments and activities
- Modify personnel and related object codes
- Develop coding policies and procedures
- Establish source document control and control procedures
- Establish a Reconciliation Process in the Finance Department
- Modify procedures and forms for reporting teacher absences and substitute teacher service
- Centralize preparation and modify procedures for processing personnel action forms
- Develop a cost reduction project to find possible alternatives for reducing costs
- Develop program charts of account and procedures for budget preparation in programmatic classification
- Coordinate the development and revision of the Fund Management System with the upgrading of the fiscal accounting system

- Review warehouse and distribution operations. Develop alternatives for improvements, including applicable resource requirements
- Develop standardized supplies and equipment numbering system and develop procedures and guidelines for implementation
- Standardize and automate special report requirements
- Develop an automated financial plan reporting capability
- Develop and implement computer scheduling and utilization procedures
- Prepare course material for monthly orientation course for new employees
- Improve business operations and management effectiveness
- Establish and enforce schedules for ordinary supplies and equipment
- Implement Inventory Supply and Equipment Management System

- Develop a long-range Computer Systems Development Plan
- Improve the Automated Editing Process in the Fiscal Accounting System
- Reduce the amount of redundant recording and review processing of source documents
- Develop an accounting procedure manual for the Finance Department
- Re-design and consolidate Personnel and Payroll related forms

PART II

STUDY RESULTS

STUDY RESULTS

Among the changes set in motion as a result of the studies are:

- The Office of the Deputy Superintendent of Management has been established.

- The Divisions of Automated Information Systems, Budget, Buildings and Grounds, Employee-Employer Relations, Finance, Federal Programs, Logistical Support and Personnel where the staff reports directly to the Deputy Superintendent for Management, have been established.

- A program budget structure has been developed to reflect subject areas of instruction.

- A tentative personnel control system that will provide total personnel accounting has been designed and is partially operational.

- Computerization of the base budget and automation of an allotment system have become operational, making available financial accounting data in the area of obligations and disbursements, payroll and status of appropriations.

PART III

GOALS OF REORGANIZATION

GOALS OF REORGANIZATION

The goals of the Office of Management can be stated as follows:

- Recruitment of personnel with specific expertise for business management

- Expansion of the Office of the Deputy Superintendent for Management to provide support staff for operational analysis, divisional coordination and managerial planning

- Reorganization of the Division of Personnel to provide the division with the capability to assume system-wide personnel responsibilities

- Complete automation of the personnel accounting system to provide complete data for all classification of personnel relative to positions filled, vacancies, expenditures per position and position assignments, as well as position control

- Re-alignment of the responsibilities of the Divisions of Budget and Finance so that full coordination exists for the delivery of financial reports, between budget and allotment aspects for all sources of funding within the system

- Development of the capability to provide fiscal data for all sources of funding within the school system

- Increasing the computer capacity for providing automated data or data-related facilities for instructional uses

- Development of an internal audit capability to monitor operation practices for non-appropriated funds, attendance reporting, and overall management practices

- Development of standard operating procedures for all management functions for the various management divisions and school units

- Developing the capability to provide management services to all divisions, thus eliminating the sub-management units operational outside the Office of Management Services

- Develop the capability within the Division of Budget to effectively manage and budget all funds regardless of the source of funding

- Reorganize the Division of Buildings and Grounds to effectively provide for the needs of maintenance, not only in the area of buildings but in the area of equipment repairs as well

- Establish the capability for long-range planning in the area of Capital Outlay

- Improve the system of the Division of Logistical Support services to provide a more responsive delivery and warehousing system

- Automation of purchasing processes for recurring purchases, order-writing and establishment of a perpetual inventory

- Reorganization of Federal Programs to provide for coordinated management of grant awards under one auspices

- Creation of an office service unit to provide for system-wide clerical, space management and record-retention needs, including the development of a micro-film capability

In spite of the activities that have been put into place as a result of the various studies, the level of management remains at a minimum acceptable level.

In many areas, the improvements can be considered to be significant; however, the efficiency of the management component of the school system is directly related to the allocation of resources needed to provide the services and support a dynamic and expanding educational program.

Full implementation of the recommendations made in the Passow, Nelsen, Management Review and Price-Waterhouse studies have been constrained by budgetary considerations, staff deficiencies, delays in filling key positions, and coordination and development of necessary working relationships with District Government agencies.

PART IV

PROPOSED REORGANIZATION

PROPOSED REORGANIZATION

A comprehensive review of the needs of the District of Columbia Public Schools for adequate management support for an expanding educational program has resulted in a determination that the organizational structure outlined in the pages to follow must become operational in order to properly meet the needs of the system, improve the required support services, and to meet the challenge of the recommendations from the Passow, Nelsen, Management Review and Price-Waterhouse Reports.

OFFICE OF THE

DEPUTY SUPERINTENDENT FOR MANAGEMENT

OFFICE OF THE DEPUTY SUPERINTENDENT FOR MANAGEMENT

The reports and studies of the District of Columbia Public Schools called for, in varying terminology, the establishment of the Office of the Deputy Superintendent for Executive Management; Deputy Superintendent for Management Services; Deputy Superintendent for Business Administration, etc.

The Office of the Deputy Superintendent for Management, having been created, has never been properly identified within the overall operation of the system, and has to a great extent been the basis for a continuing dichotomizing of the school system and personnel into camps of Educational Line vs. Management Line. This dichotomy has been intensified by differences in salary schedules for Teacher Salary Act Staff and General Schedule Staff.

To properly serve the system, it is necessary to eradicate the concept of dual and unequal lines of responsibility. The overall needs of the system must be identified as needs to be addressed to by all segments of the managerial staff, be they direct educational functions or business management functions.

The overall needs of the educational process are served and sustained by the support services of a management group. The type and quality of service rendered directly impacts on the results achieved in the classroom.

In keeping with this line of thinking, the reorganization of management services which follow are designed to put in place the organizational structure which will best serve the system as a whole. The physical reorganization in and of itself will not achieve this end. Only upon full implementation of the reorganization and the dispersion of the attitudinal concepts of separation of "lines" will overall success be achieved.

In order to bring about the efficiency necessary, the responsibilities of the Deputy Superintendent are:

- Overall administrative responsibility for the supervision and operation of the divisions and bureaus assigned to the Office of the Deputy Superintendent for Management

- To assist the Superintendent in implementing all phases of the operation of the school system

- In the name of the Superintendent, carries out all of those functions and responsibilities as assigned which are normally handled by the Superintendent

- Works cooperatively with the Deputy Superintendent for Instructional Services to coordinate the services for greater impact upon the regions of the school system

- Works ultimately with designated committees of the Board of Education as the Superintendent's representative

- Provides immediate information and staff assistance to the Superintendent on all school matters

- Assists the Superintendent in the development of plans and guidelines for the operation of the District of Columbia Public Schools

- Directs staff activities and provides supervision and guidance to Divisional Assistant Superintendents

- Reviews plans for facilities with Regional Superintendents and proposes appropriate modifications

- Approves plans for attendance units and school facilities to be submitted to the Superintendent

- Participates in developing operating and capital budgets, provides for consolidation of budgets submitted by division heads and regional Superintendents, and works with subordinates to reconcile budget demands in excess of available funds

- Recommends to the Superintendent the appointment, transfer, and reassignment of personnel reporting to the Deputy Superintendent

- Provides for teacher assignments to the schools

- Establishes administrative controls over system expenditures

- Provides input from operating staff in negotiations with employee groups

- Provides personnel security for students and staff of the school system

- Implements Board of Education policy in all assigned areas

- Develops and recommends organizational modifications as needed

- Evaluates the effectiveness of field and staff groups reporting to the Deputy Superintendent

- Evaluates and approves applications for non-resident students

- Meets regularly with the Superintendent and Deputy Superintendent for Instruction to coordinate the implementation of educational programs

- Provides written reports to the Superintendent that will be of value to her and to the Board of Education

- Meets with staff members and administrators; additionally, issues written directives when necessary

- Meets with field administrators and department heads where appropriate to review budget items and programs in the District of Columbia Public Schools

- Meets with members of staff individually or in small groups, when needed

- Issues written directives when necessary

- Reviews with division heads steps being taken to implement Board of Education policies and programs

- Provides guidance to division heads on operating staff

- Visits schools periodically for on-site meetings with Principals and Regional Superintendents

- Maintains close relationships with heads of divisions on the planning staff

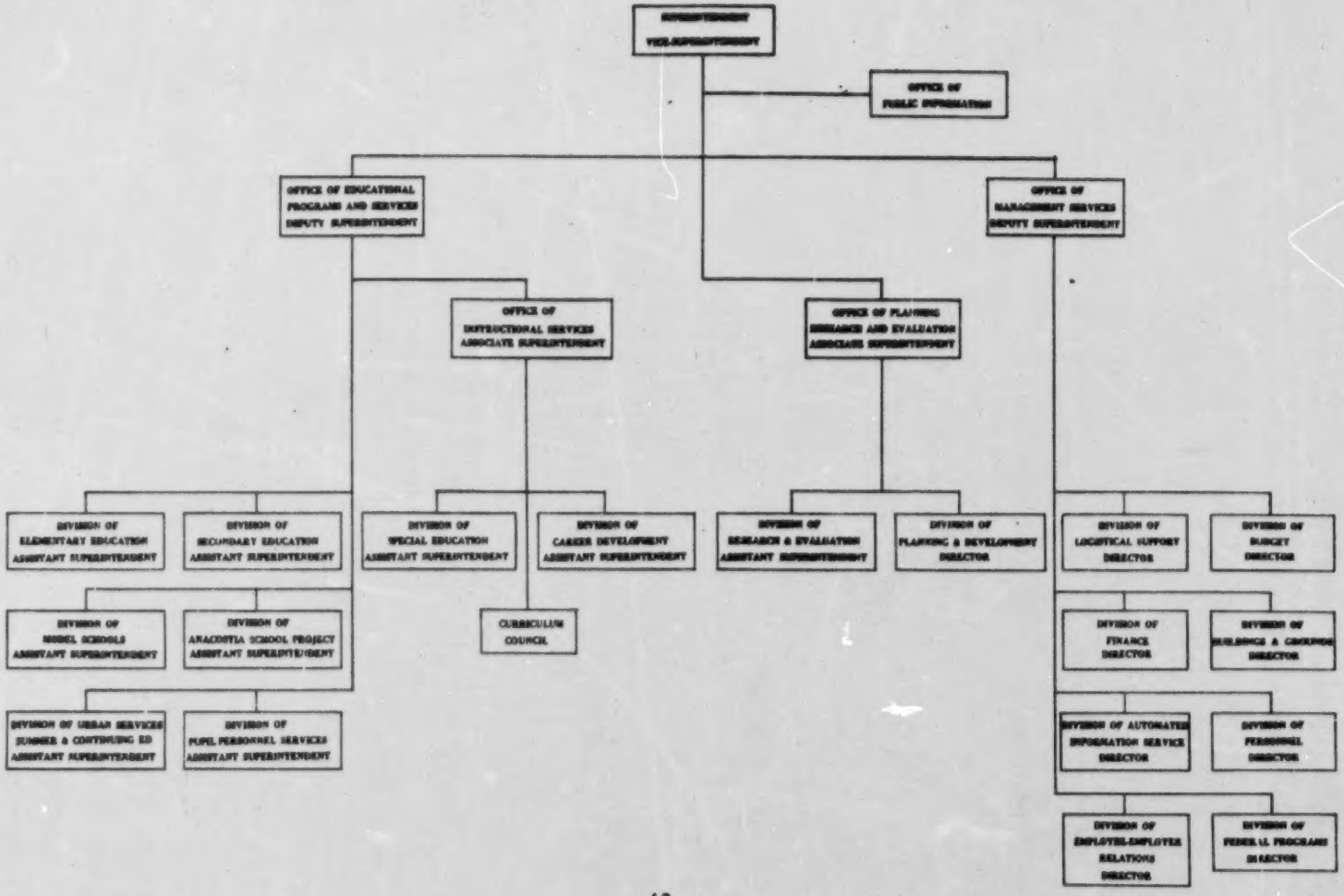
- Appoints and meets with committees of field and and central office staff assigned to work on special projects for the school system

- Maintains liaison with City agencies and community organizations in relation to the day-to-day operation of the school system

- Maintains liaison with heads of government, private agencies, and other school districts in relation to day-to-day operation of the school system

ORGANIZATION CHART
D. C. PUBLIC SCHOOLS

EXHIBIT I


OFFICE OF PUBLIC INFORMATION
OFFICE OF EDUCATIONAL PROGRAMS AND SERVICES DEPUTY SUPERINTENDENT
OFFICE OF MANAGEMENT SERVICES DEPUTY SUPERINTENDENT
OFFICE OF INSTRUCTIONAL SERVICES ASSOCIATE SUPERINTENDENT
OFFICE OF PLANNING RESEARCH AND EVALUATION ASSOCIATE SUPERINTENDENT
DIVISION OF ELEMENTARY EDUCATION ASSISTANT SUPERINTENDENT
DIVISION OF SECONDARY EDUCATION ASSISTANT SUPERINTENDENT
DIVISION OF SPECIAL EDUCATION ASSISTANT SUPERINTENDENT
DIVISION OF CAREER DEVELOPMENT ASSISTANT SUPERINTENDENT
DIVISION OF RESEARCH & EVALUATION ASSISTANT SUPERINTENDENT
DIVISION OF PLANNING & DEVELOPMENT DIRECTOR
DIVISION OF LOGISTICAL SUPPORT DIRECTOR
DIVISION OF BUDGET DIRECTOR
DIVISION OF MODEL SCHOOLS ASSISTANT SUPERINTENDENT
DIVISION OF ANACOSTIA SCHOOL PROJECT ASSISTANT SUPERINTENDENT
CURRICULUM COUNCIL
DIVISION OF FINANCE DIRECTOR
DIVISION OF BUILDINGS & GROUNDS DIRECTOR
DIVISION OF URBAN SERVICES SUMMER & CONTINUING ED ASSISTANT SUPERINTENDENT
DIVISION OF PUPIL PERSONNEL SERVICES ASSISTANT SUPERINTENDENT
DIVISION OF AUTOMATED INFORMATION SERVICE DIRECTOR
DIVISION OF PERSONNEL DIRECTOR
DIVISION OF EMPLOYEE-EMPLOYER RELATIONS DIRECTOR
DIVISION OF FEDERAL PROGRAMS DIRECTOR

PREPARED BY MANAGEMENT SERVICES — MARCH, 1971

APPROVED Hugh J. Scott — MARCH, 1971

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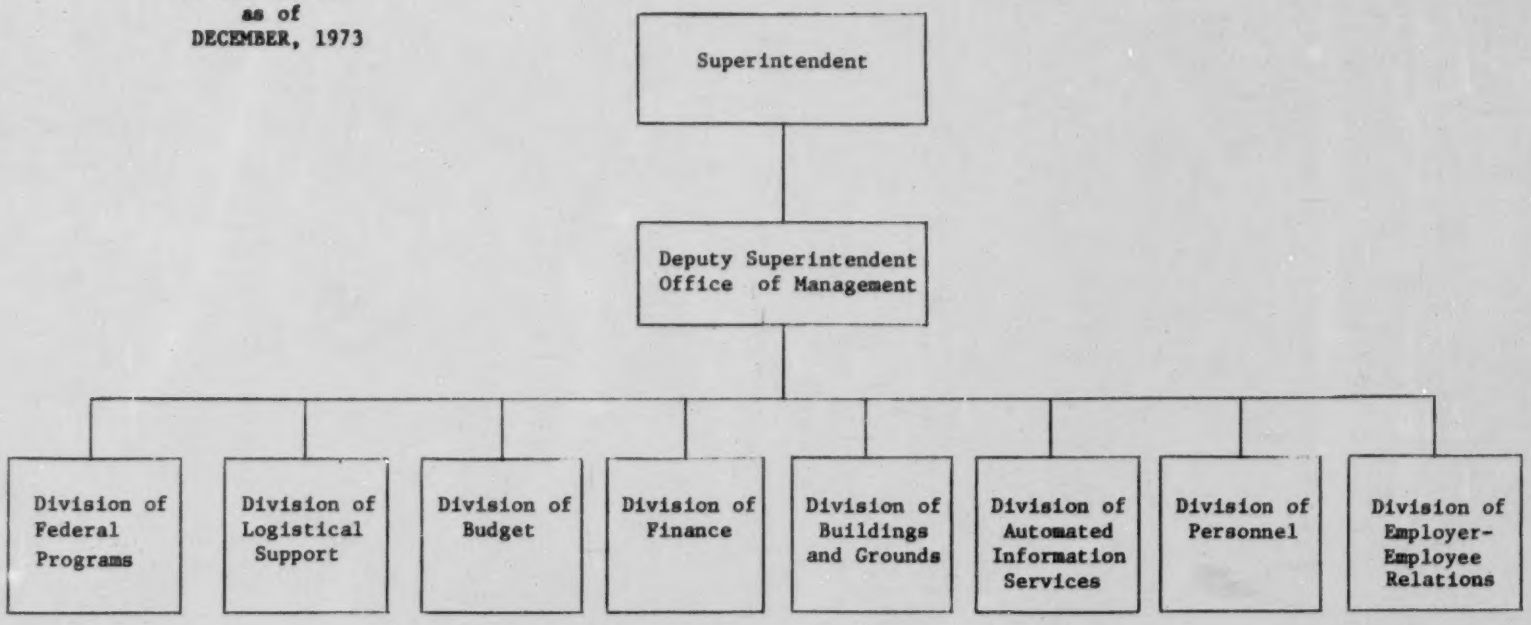
OFFICE OF MANAGEMENT SERVICES

EXHIBIT II

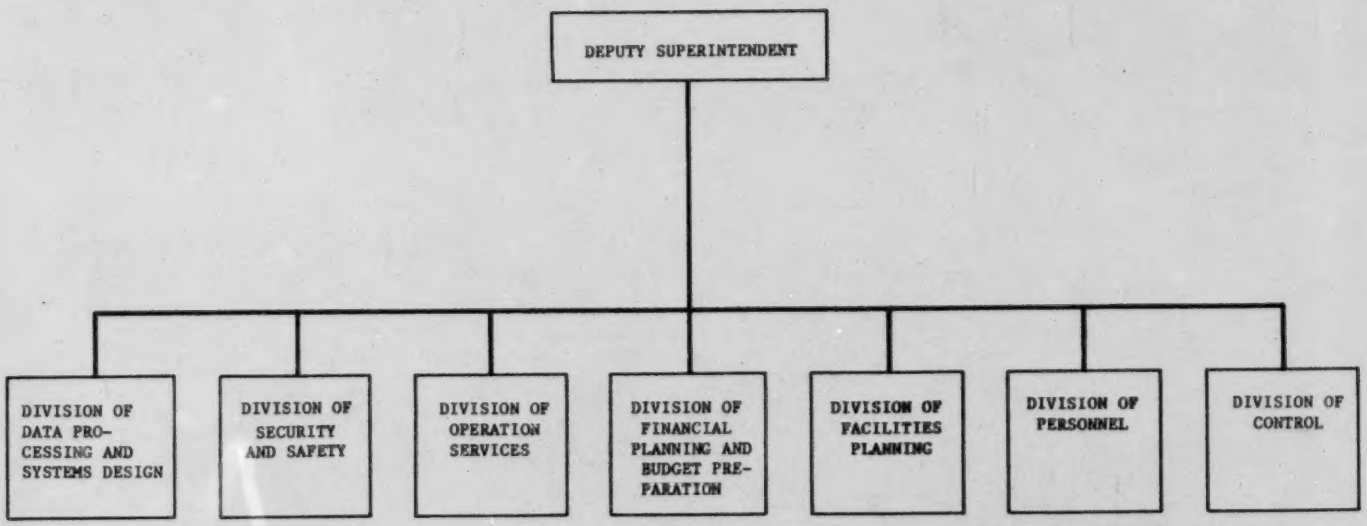
ORGANIZATION
as of
DECEMBER, 1973



REVISED ORGANIZATION
AS OF MAY, 1974

EXHIBIT IIA

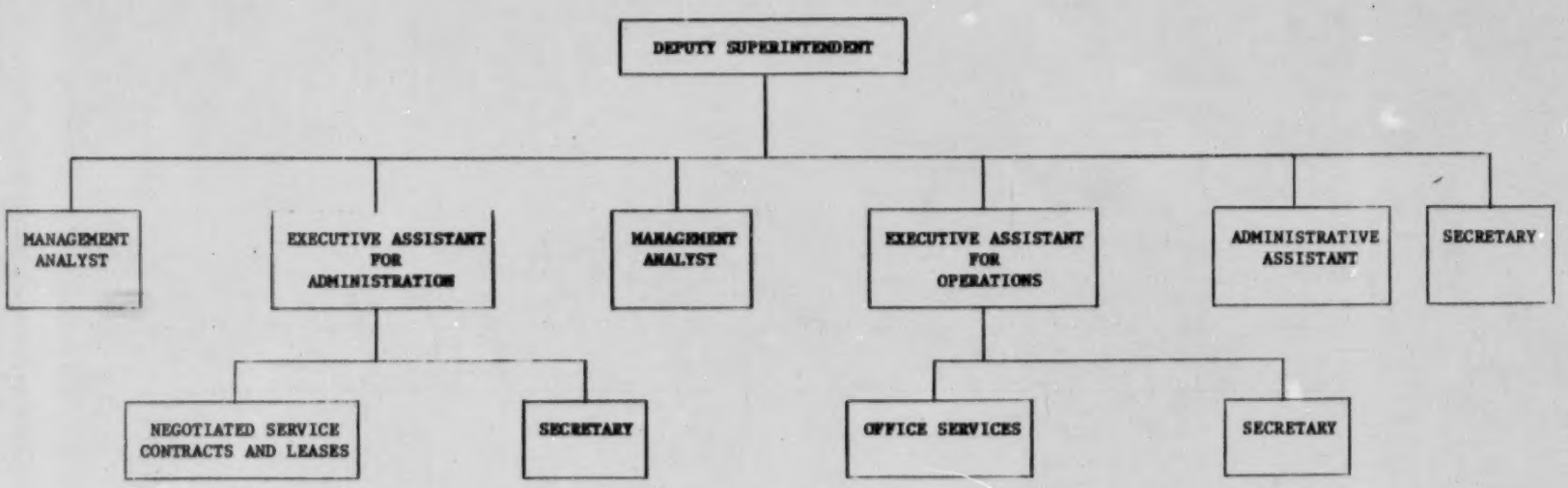
OFFICE OF MANAGEMENT SERVICES


DEPUTY SUPERINTENDENT
DIVISION OF DATA PRO-CESSING AND SYSTEMS DESIGN
DIVISION OF SECURITY AND SAFETY
DIVISION OF OPERATION SERVICES
DIVISION OF FINANCIAL PLANNING AND BUDGET PRE-PARATION
DIVISION OF FACILITIES PLANNING
DIVISION OF PERSONNEL
DIVISION OF CONTROL

REVISED ORGANIZATION AS
OF MAY, 1974

OFFICE OF THE DEPUTY SUPERINTENDENT

EXHIBIT IIB



DIVISION OF AUTOMATED INFORMATION SYSTEMS

The progress of the District of Columbia Public School system toward a goal of effective management, to a very large extent, depends on its ability to produce data, retrieve data, and furnish timely reports in all areas, fiscal as well as instructional, for use by management as tools for effective decision making.

In conjunction with these needs, the Division of Automated Information Systems, as presently constituted, will be abolished and the Division of Data Processing and Systems Design will be established.

In order to provide the services, since this division is a service-oriented division, it is necessary to provide the capability as indicated in Exhibit IV. The new division must be upgraded, both in terms of staff and equipment in order to meet the demands of an expanding and viable school system.

Based on the needs of the system and the duties which must be performed, the responsibilities of the division are:

- Provides analysis of the systems' needs
- Establishes and meets the systems and procedures needs for all units

- Determines and meets data processing needs
- Determines and meets non-automated systems and procedures needs
- Develops, programs, and installs systems as required to meet identified needs
- Provides for efficient handling and operation of data processing equipment
- Evaluates data processing equipment requirements
- Provides for development and dissemination of division procedures for systems development, documentation, and installation
- Controls school system forms
- Conducts in-service education for users of administrative and instruction systems
- Participates in the development of the departmental budget
- Supervises computer-based instruction systems, such as data processing education programs and computer-assisted instruction

- Disseminates procedures, rules, and regulations
- Issues divisional bulletins as required
- Develops, writes, publishes, and controls all board-wide administrative procedures
- Meets on a regular basis with the central office and regional staff as necessary
- Provides for in-service instruction by division staff
- Designs and implements systems to relieve staff members of the task of manually preparing reports
- Designs and implements systems that enable the Division of Planning, Research, and Evaluation to produce accurate, detailed and summary reports routinely requested
- Provides timely, accurate, and relevant reports to the operating divisions so that evaluation of existing programs and procedures can be made effectively
- Addresses problems in the area of personnel

- Establishes procedures to create and maintain permanent data files which can be used to generate various types of special statistical reports
- Converts source documents into machine-processible forms
- Maintains the integrity of various files
- Prepares output reports from files or from source data in accordance with the needs of the various user divisions
- Provides student scheduling at the school level
- Conducts student scheduling workshops for in-school administrators
- Maintains a personnel position control file
- Establishes and maintains a personnel/payroll file
- Produces monthly fiscal reports
- Processes student transfers
- Processes all purchases and establish a file of purchase orders and record of encumberances

. Provides for automation of inventory and warehousing of purchases

In order to meet the responsibilities outlined above, this division more than any other, must provide for a major acquisition of staff.

ORGANIZATION
as of
DECEMBER, 1973

DIVISION OF AUTOMATED INFORMATION SYSTEMS

EXHIBIT III

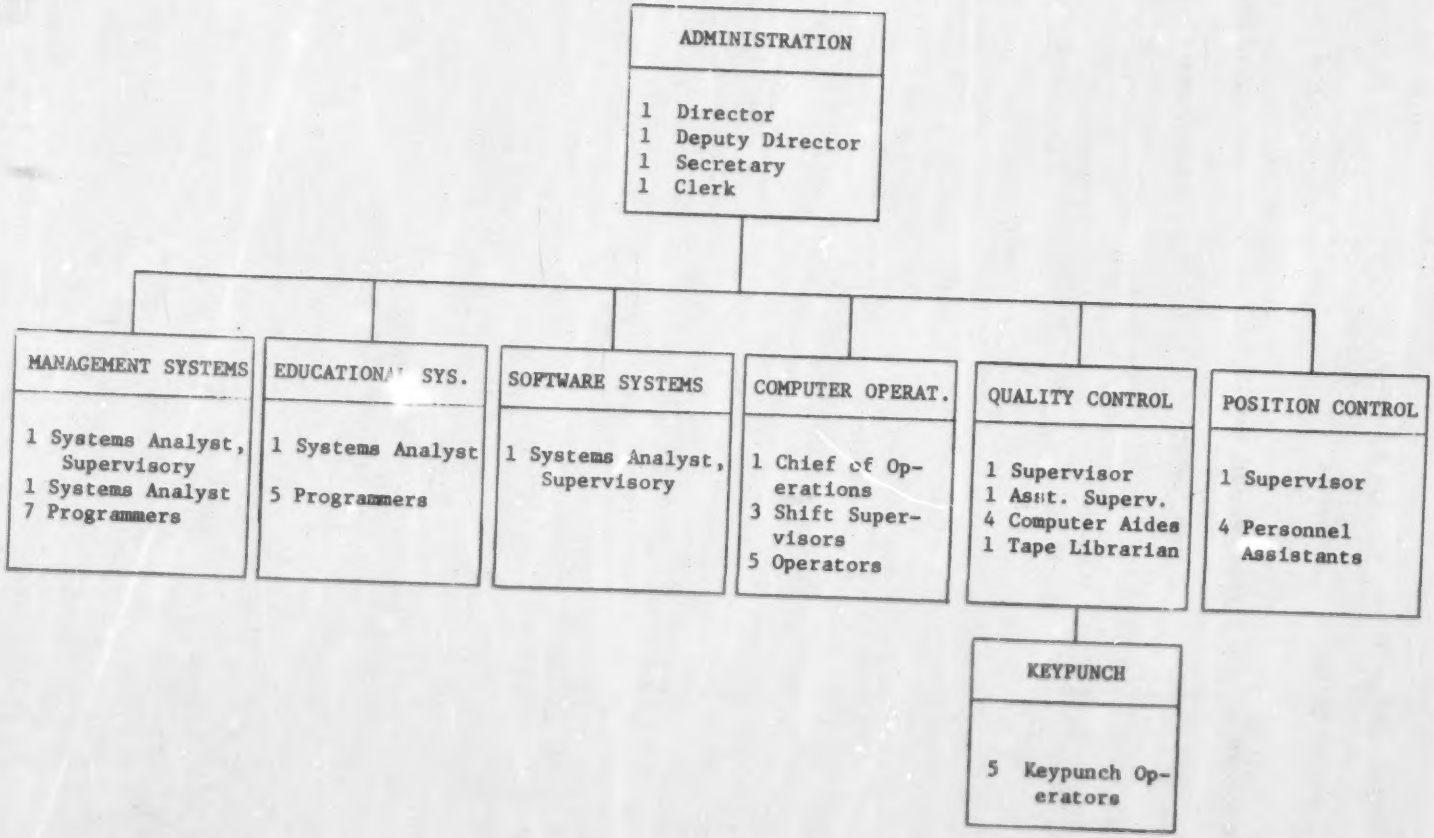
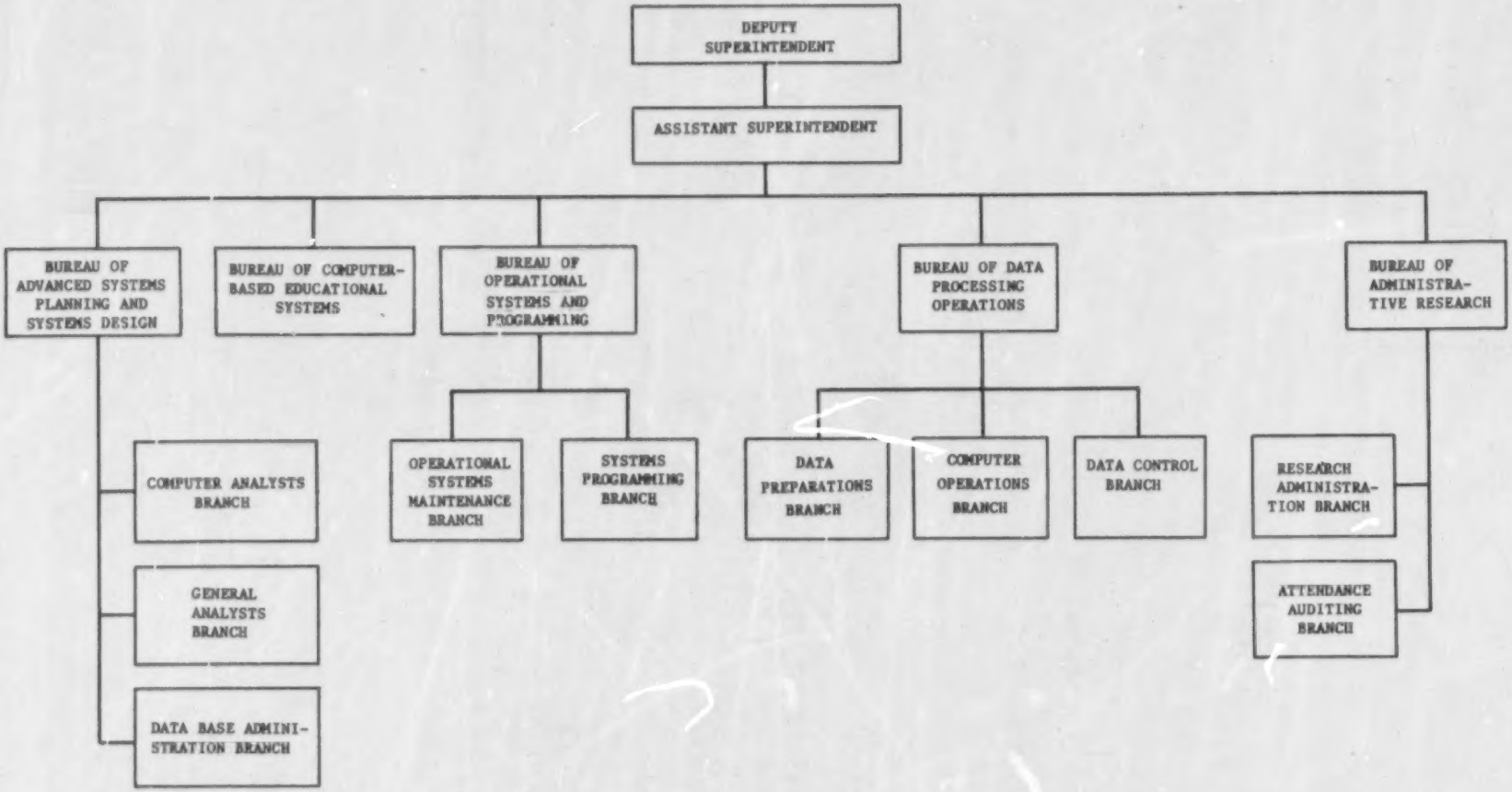


EXHIBIT IV

REVISED ORGANIZATION AS OF MAY, 1974

DIVISION OF DATA PROCESSING AND SYSTEMS DESIGN



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DIVISIONS OF FINANCE AND BUDGET

The Division of Finance, as presently organized, is not able to provide for the school system the needed financial data for decision making.

This condition exists primarily because the linkages necessary between the Division of Budget and the Division of Finance are poor or do not exist in some areas.

In addition to these factors, the Division of Finance is structurally weak and lacks automated data from which to generate a finished product; namely, timely and accurate fiscal data in all expenditure areas, including the area of Federal funding.

The Division of Budget should be very closely tied to the financial operation of the school system. In this respect, its relationship to the Division of Finance is an absolute.

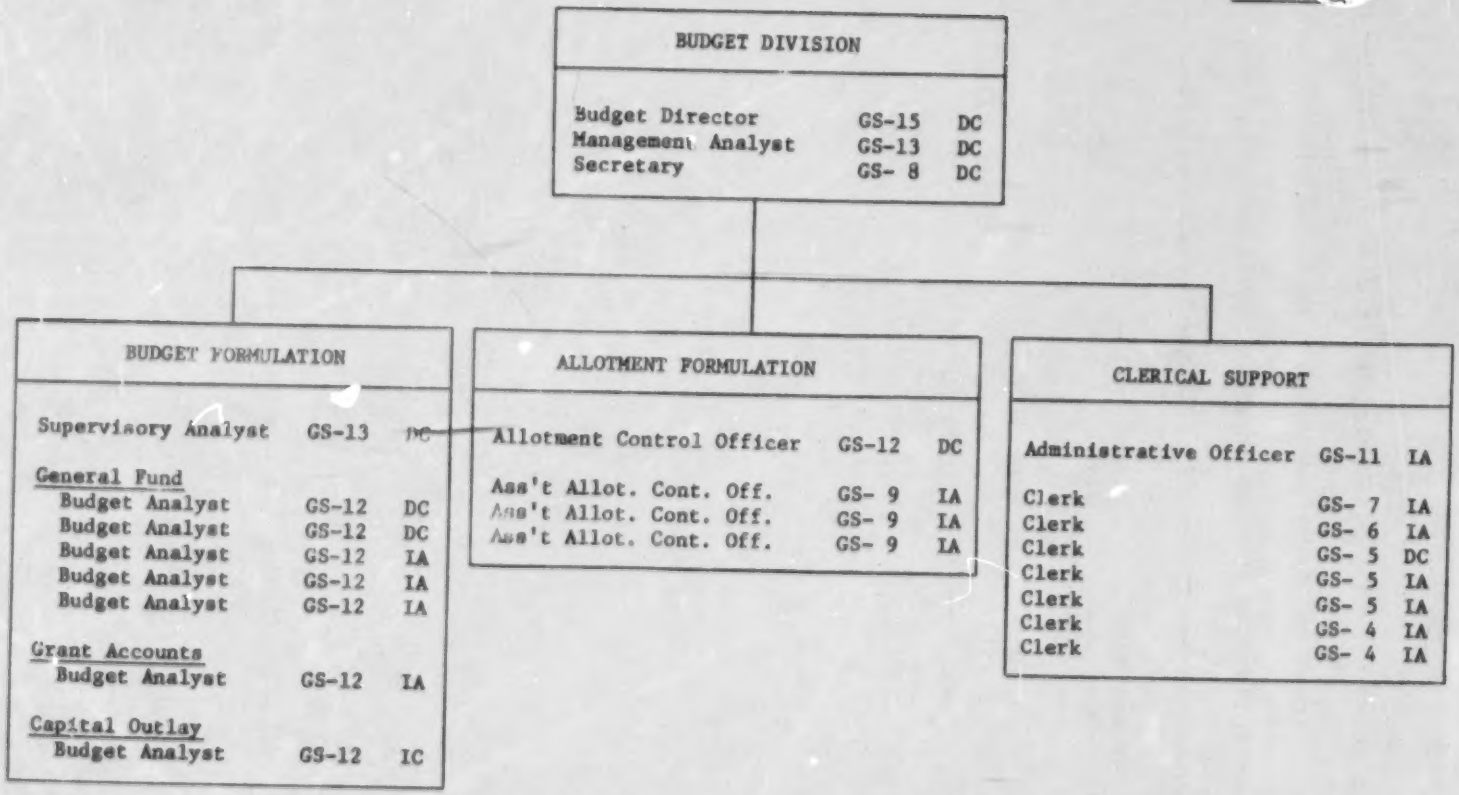
In some instances, procedures being undertaken in the Budget Division are, in fact, procedures that are dependent on the data generated in the Finance Division and should properly be the responsibility of that division.

Additionally, the Budget Division is in need of re-structuring to adequately provide budgetary service to all facets and funding sources, as well as be in a position to do long-range budgetary planning, and movement to a PPB system for the school system.

For the above reasons, the Divisions of Finance and Budget will be restructured and incorporated as bureaus in a Division of Control as delineated in this report. Provisions will be made to provide for a unit specifically for budget preparation and long-range planning.

ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT V



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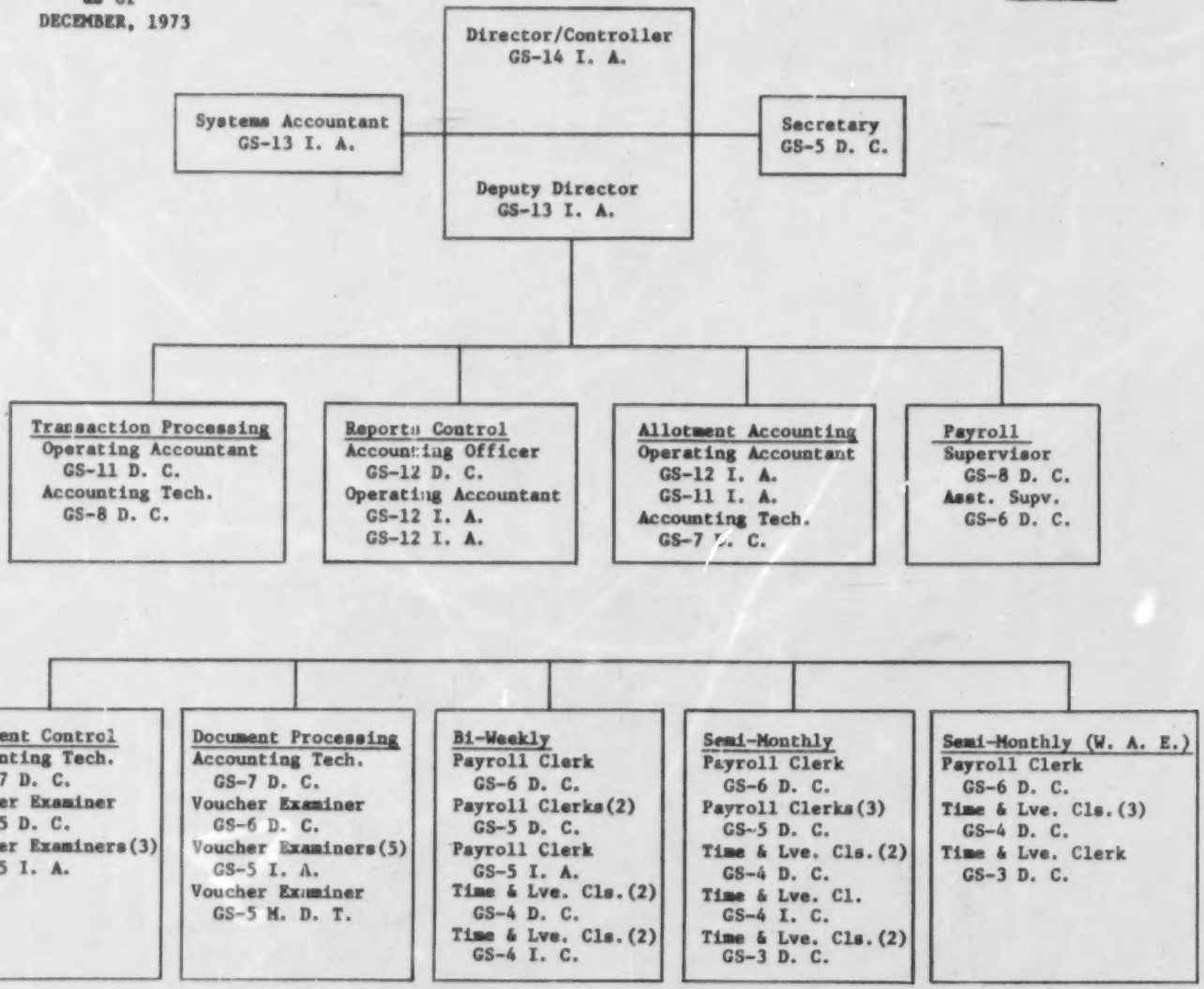
ORGANIZATION
as of
DECEMBER, 1973

DIVISION OF FINANCE

EXHIBIT VI



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DIVISION OF BUILDINGS AND GROUNDS

The Division of Buildings and Grounds has, at present, wide-range responsibilities in the areas of maintenance, custodial, architectural building design, construction monitoring, equipment repair, and for Capital Outlay, as well as equipment specification evaluation.

In reviewing the operation of this division, overlap with functions that exist in other divisions exists, especially in the area of maintenance and repair.

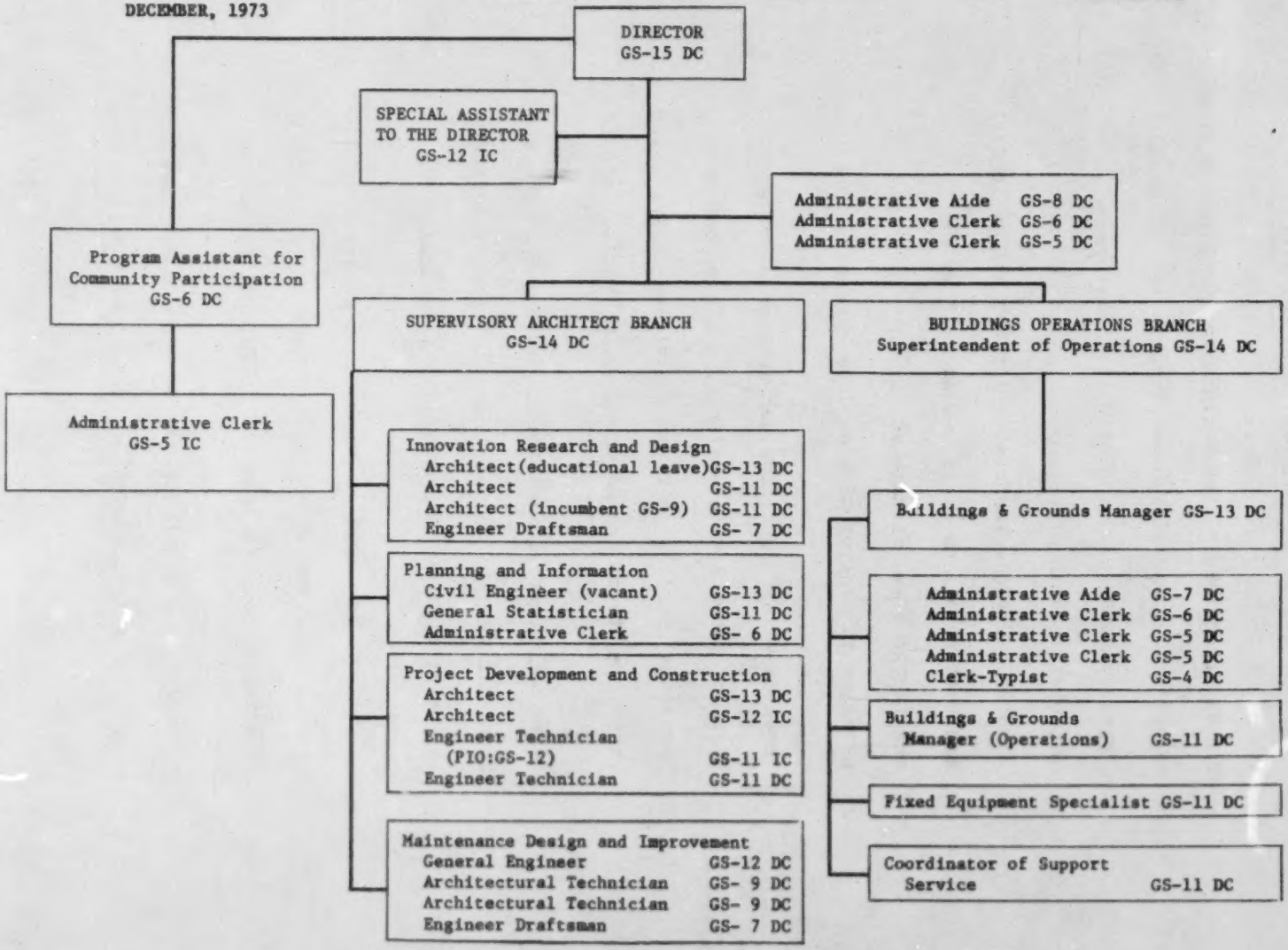
In addition to overlap, the division has such wide-range diversification of purpose, that needs in the area of Facilities Planning are not properly addressed and advance planning suffers.

In order to bring into being a proper use of available resources as well as establishing the capability that is needed in the area of Facilities Planning, the Division of Buildings and Grounds will be abolished, with its staff and functions being distributed to respective divisions as appropriate and as identified in this report.

ORGANIZATION
as of
DECEMBER, 1973

DIVISION OF BUILDINGS AND GROUNDS

EXHIBIT VII



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DIVISION OF EMPLOYEE-EMPLOYER RELATIONS

The basic functions of the Division of Employee-Employer Relations as it is presently constructed is as follows:

- Develop and maintain an effective employee-employer relations program for the D. C. Public Schools. Overall responsibility for all employee-employer relations functions as well as the negotiations and management advisory functions entailed in dealing with employee organizations

- Serve as Chief Negotiator and spokesman for the Board of Education in meetings, conferences and bargaining sessions with organizations representing various employee groups of the D. C. Public Schools

- Serve as principal advisors to the Board of Education, Superintendent of Schools and other school officers in the area of employee-employer relations

- To develop the Board of Education's position on all demands submitted by employee organizations submitted both during negotiations and throughout the year

- Administer and interpret all Agreements that are negotiated with employer organizations. Provide

advice, assistance and implementation instructions on negotiated Agreements to school officers and supervisors

- Serve as the Superintendent's designee at the Superintendent's level of all formal grievance procedures and make all arrangements for hearing these grievances

- Conduct workshops for school officers and supervisors on negotiated Agreements and other aspects of labor-management relations. Visit schools and administrative offices as required, often on an emergency basis, to assist in settling disputes and problems. Receive a variety of formal and informal complaints and grievances and strive to promote settlements that are fair to both the employee and the employer

- Prepare and present the Board of Education's position on all grievances going to final and binding arbitration

- Review proposals to be submitted to the Superintendent or the Board of Education from various school offices to insure that such proposals are not in conflict with any negotiated Agreements or employer-employee principals

- Provide advice and assistance to State jurisdictions and Boards of Education in employee-employer relations

- Research of precedents, trends, practices, laws, regulations, decisions, contractual agreements, development of statistics; preparation of reports, and analyses of factual data

The administration of Employee-Employer Relations is a defined personnel function and should be properly housed within that division. However, the division, as presently constituted, has a high percentage of its energies directed toward the contract negotiation process with the various unions and is acting as the Superintendent's Hearing Officer in the final step of a grievance.

Although the relationship between negotiations of a contract and the administration of Employee-Employer Relations is close, it is felt that the best possible organization structure would be for the functions of employee relations to be absorbed into the operations of the Division of Personnel and the Office/Position of Labor Relations be established for the purpose of contract negotiation.

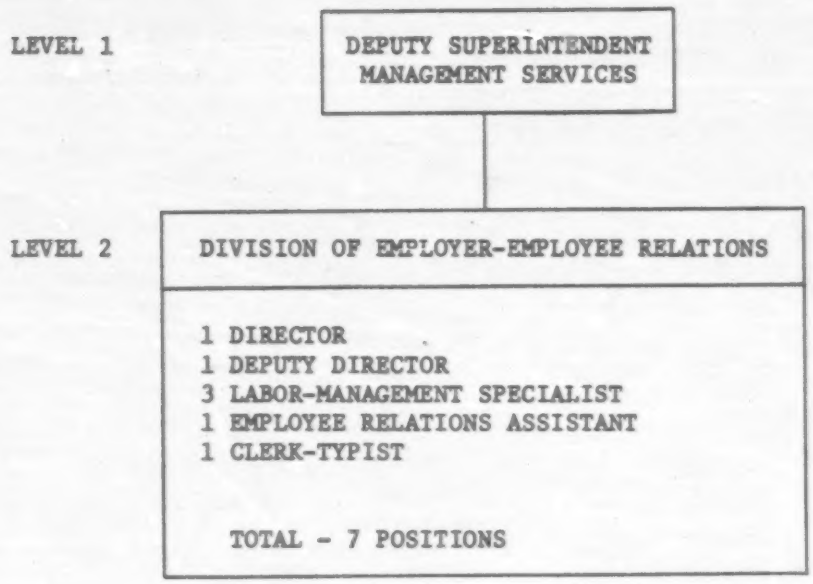
The separation of functions would leave free the principal negotiator to concentrate in areas of contract needs and interpretation.

The Division of Employee-Employer Relations would be abolished and a Bureau of Employee Relations would be established in the Division of Personnel with the employee relations functions and appropriate staff being transferred to that division.

ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT VIII

DIVISION OF EMPLOYER-EMPLOYEE RELATIONS



DIVISION OF FEDERAL PROGRAMS

The Division of Federal Programs, as presently organized, operates as a State Office for receipt and management of federal grant awards.

However, as structured, it involves itself administratively with only a small fraction of the total grants administered by the school system.

It concentrates its efforts in the following grant areas:

- Impact Aid
- NDEA, Title III
- Assistance to Children in Institutions for Neglected or Delinquent
- ESEA, Title I
- ESEA, Title III
- ESEA, Title IV
- ESEA, Title V
- ESEA, Title VII
- ESEA, Title VIII
- ESEA Amendments

This slanted concentration leaves outside its scope the following grants:

- Head Start
- Fellowships for Teachers of Handicapped
- Follow Through
- Adult Demonstration Education
- Special Education
- Adult Basic Education
- ESEA, Title II
- ESEA, Title VI
- Educations Professions Development Act
- Vocational Education
- Agriculture Act
- ESAA

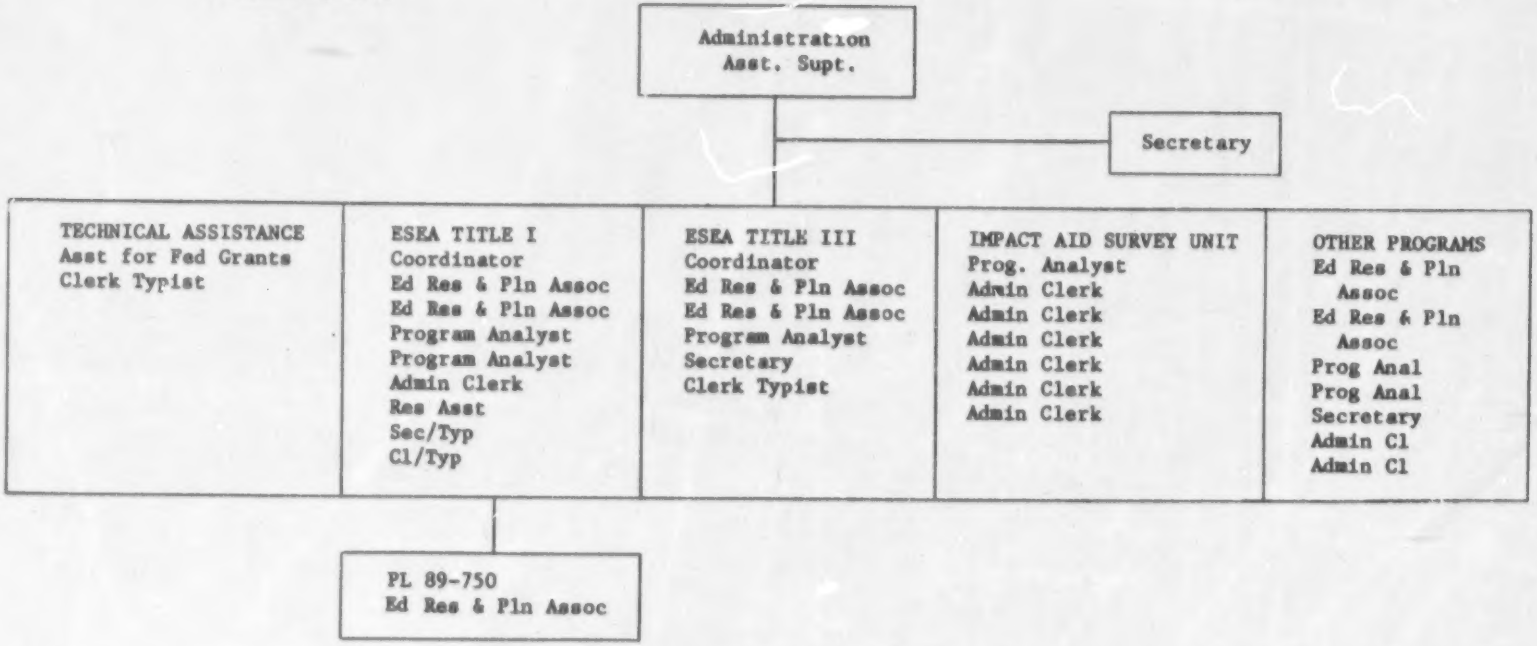
Since federal funds are such an enormous source of funding, it is felt that the responsibilities of the Division of Federal Programs must be broadened to include all of the areas not presently included under its administration and at the same instance, move the Division under the umbrella of a larger organizational structure as several bureaus, responsible for the administration of all the different funded programs in accordance with the programmatic guidelines of the funding agencies.

The responsibilities for the Division of Federal Programs will transfer to the newly created Division of State Administration.

ORGANIZATION
as of
DECEMBER, 1973

FEDERAL PROGRAMS

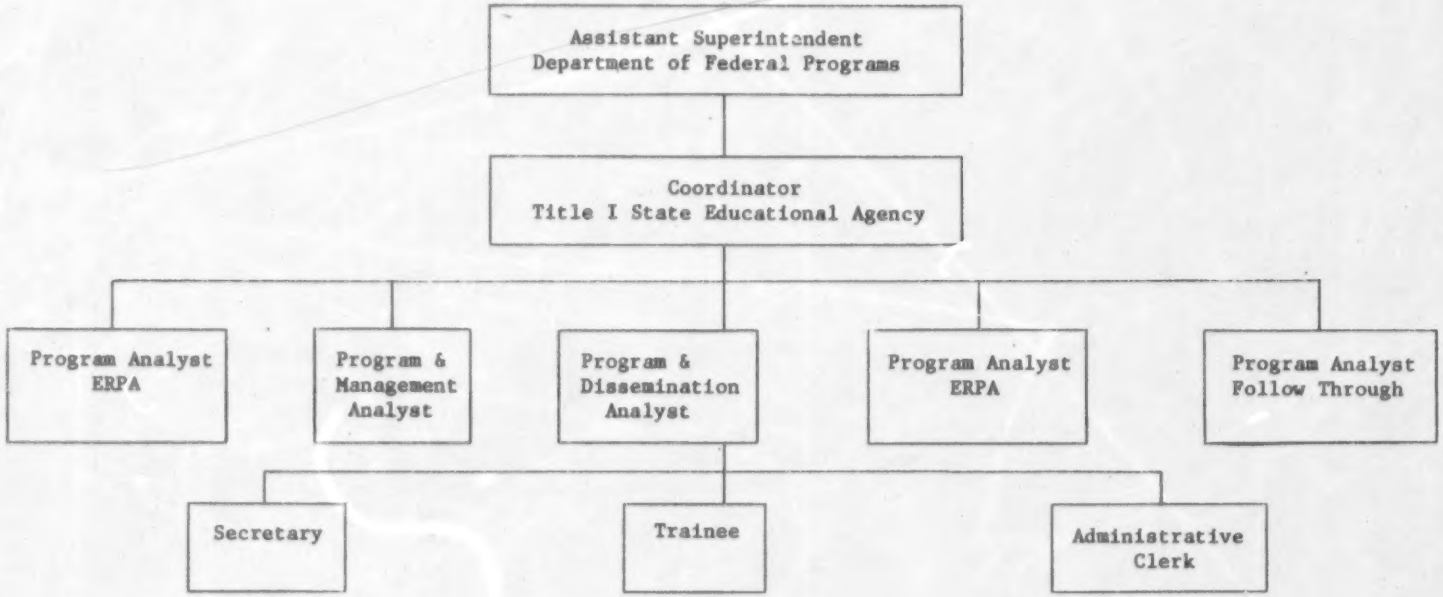
EXHIBIT IX



ORGANIZATION
as of
DECEMBER, 1973

ESEA TITLE I ORGANIZATIONAL CHART

EXHIBIT IX



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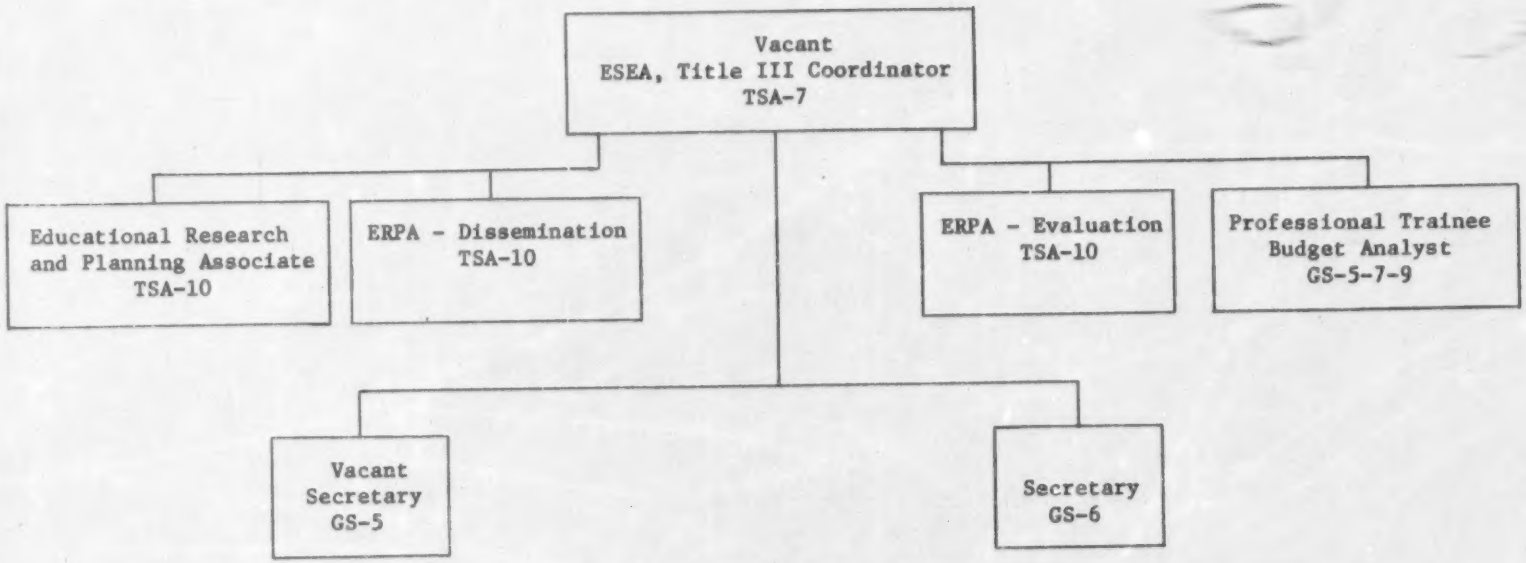
ORGANIZATION
as of
DECEMBER, 1973

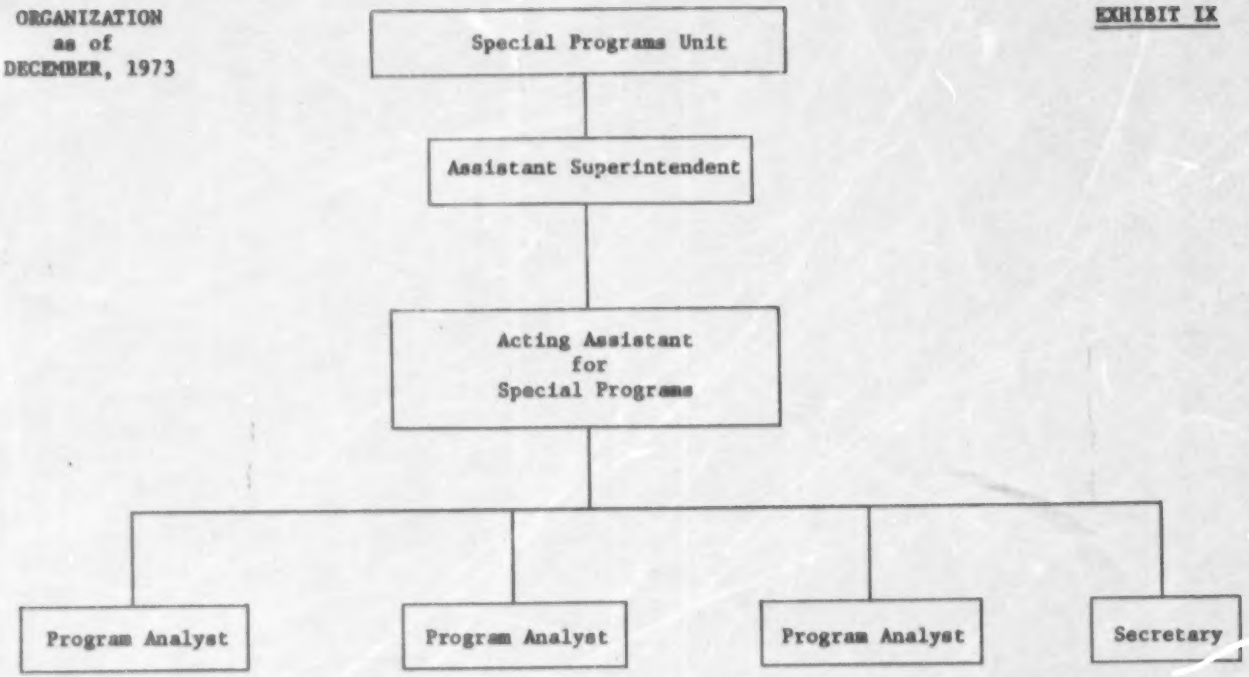
PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF FEDERAL PROGRAMS
ESEA, TITLE III

EXHIBIT IX



ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT IX



DIVISION OF LOGISTICAL SUPPORT

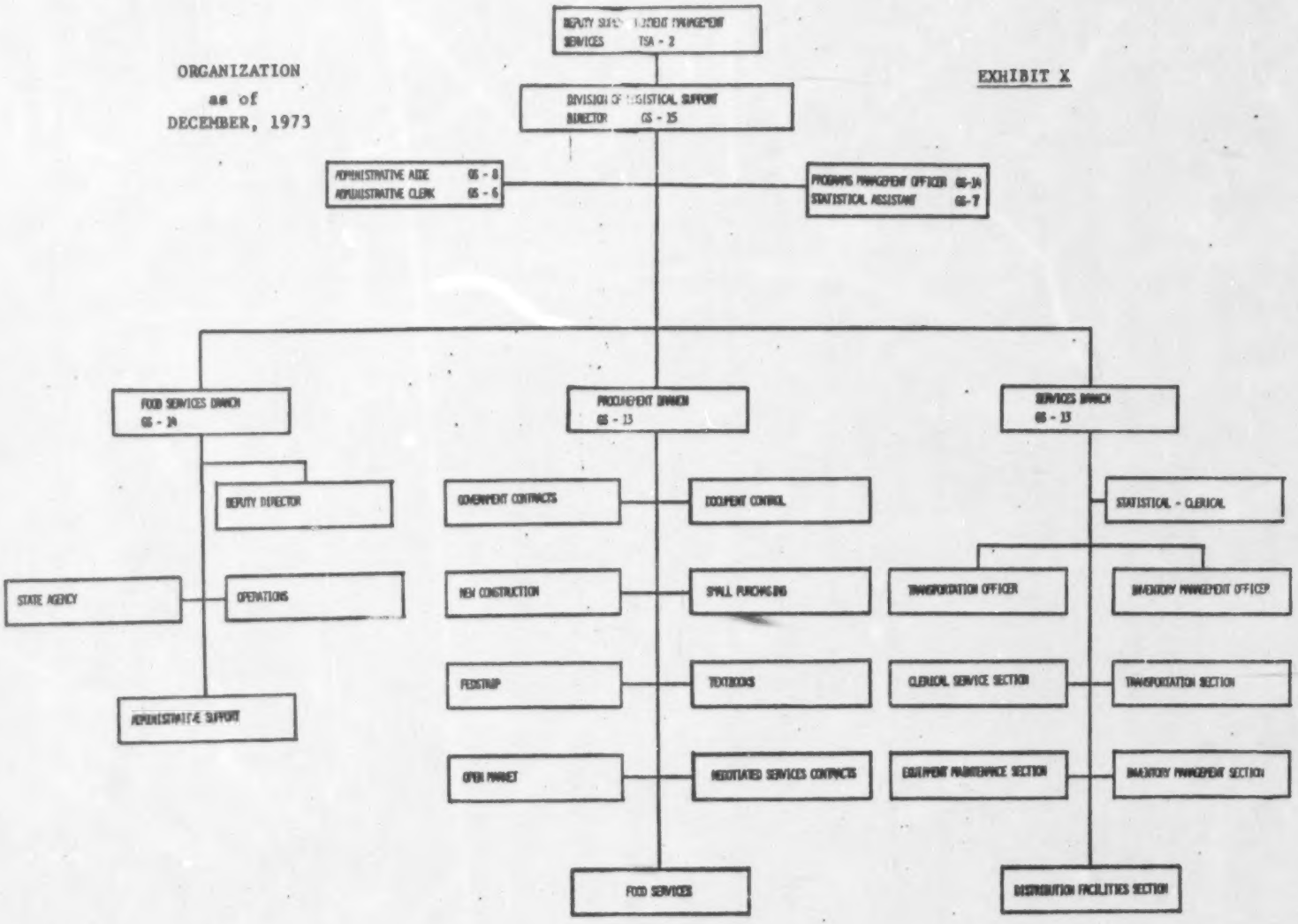
The Division of Logistical Support presently encompasses a diversity of operations, as indicated by the organizational chart, Exhibit X.

In some cases, the operations include items which properly should be combined with operations in the present Divisions of Buildings and Grounds, Finance, State Administration and Automated Information Services. Some functions now are properly related to the design of facilities or the administration of functions that have local system functions and some that have special reporting relationships with outside agencies.

In order to properly align the functions that now rest in the Division of Logistical Support, the division will be abolished and its sundry operations and staff transferred to other divisions as outlined in this report.

ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT X



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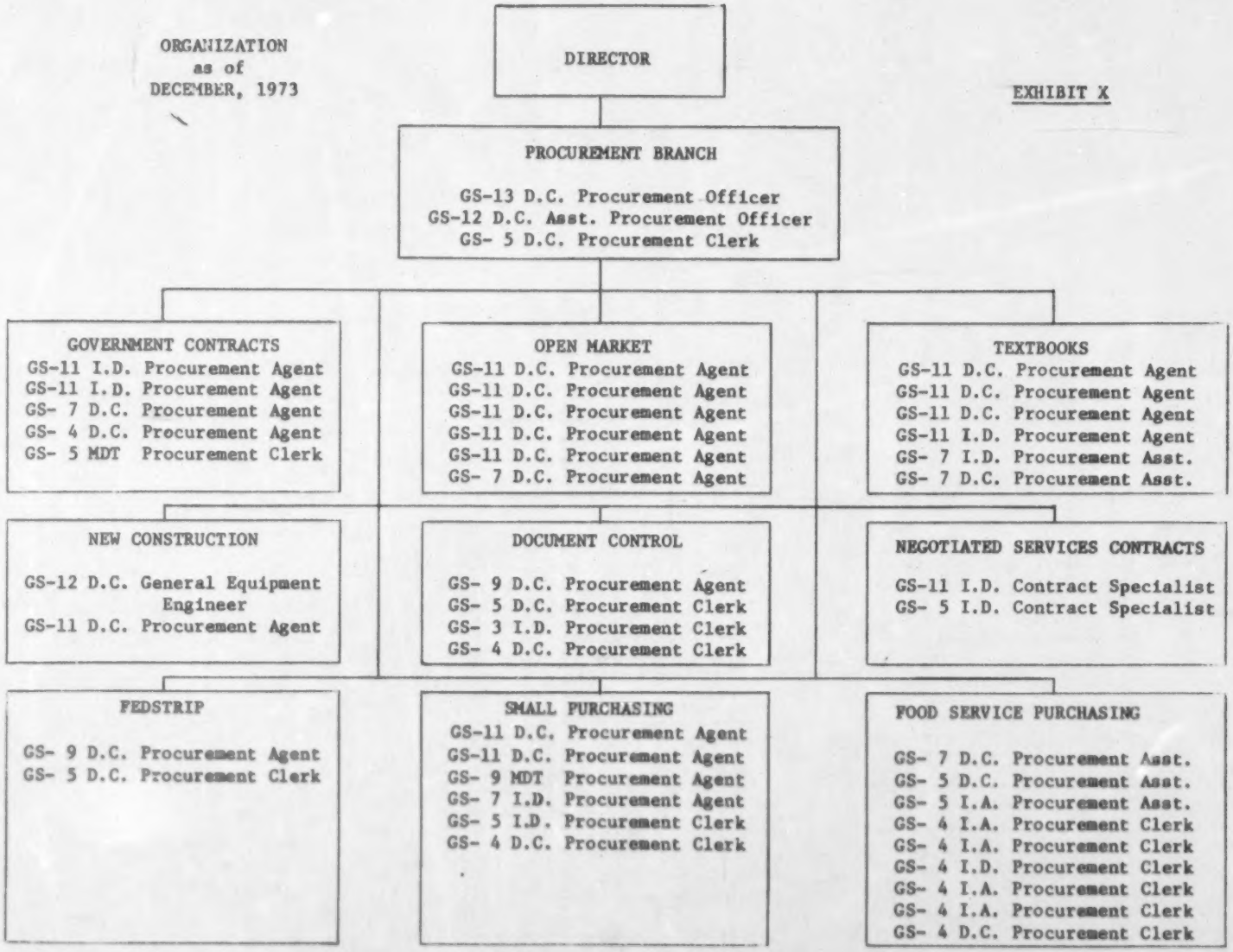
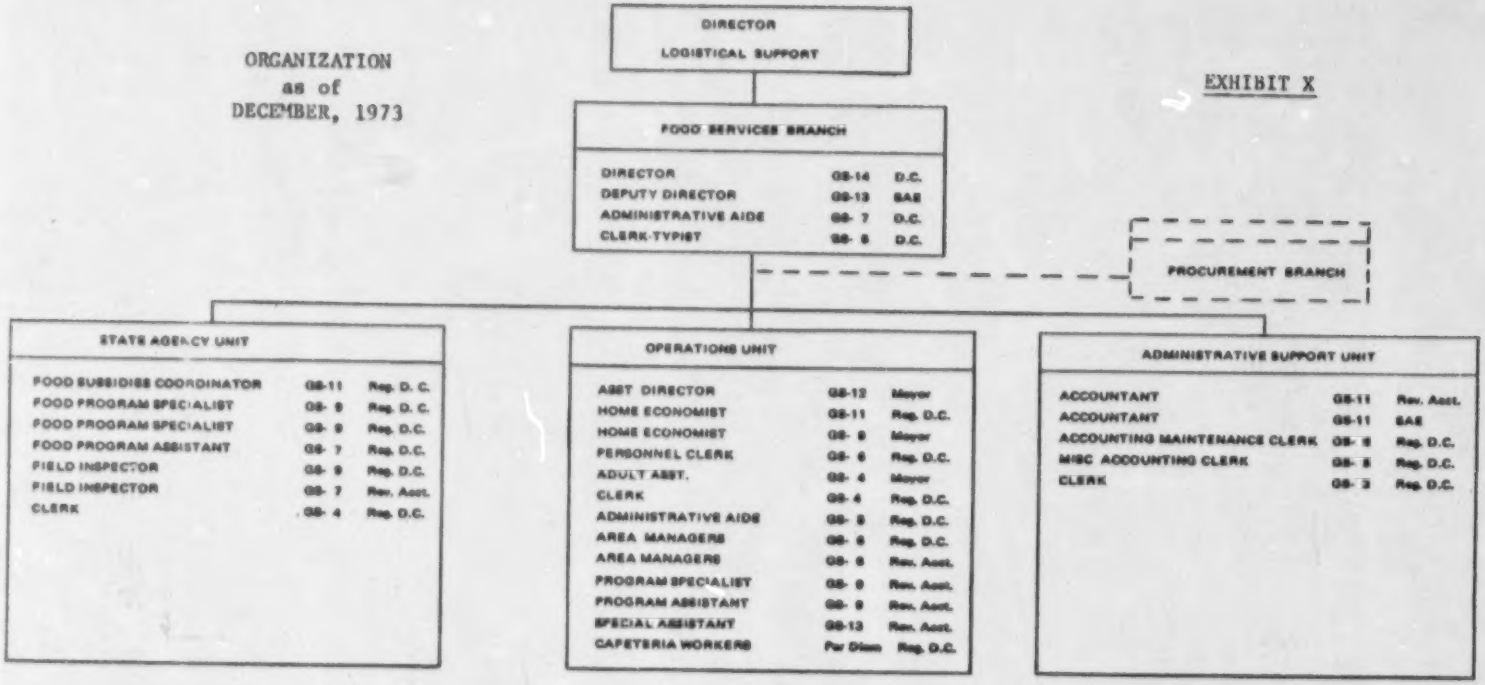
ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT X


DIRECTOR
PROCUREMENT BRANCH
GS-13 D.C. Procurement Officer
GS-12 D.C. Asst. Procurement Officer
GS- 5 D.C. Procurement Clerk
GOVERNMENT CONTRACTS
GS-11 I.D. Procurement Agent
GS-11 I.D. Procurement Agent
GS- 7 D.C. Procurement Agent
GS- 4 D.C. Procurement Agent
GS- 5 MDT Procurement Clerk
OPEN MARKET
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS- 7 D.C. Procurement Agent
TEXTBOOKS
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS-11 I.D. Procurement Agent
GS- 7 I.D. Procurement Asst.
GS- 7 D.C. Procurement Asst.
NEW CONSTRUCTION
GS-12 D.C. General Equipment Engineer
GS-11 D.C. Procurement Agent
DOCUMENT CONTROL
GS- 9 D.C. Procurement Agent
GS- 5 D.C. Procurement Clerk
GS- 3 I.D. Procurement Clerk
GS- 4 D.C. Procurement Clerk
NEGOTIATED SERVICES CONTRACTS
GS-11 I.D. Contract Specialist
GS- 5 I.D. Contract Specialist
FEDSTRIP
GS- 9 D.C. Procurement Agent
GS- 5 D.C. Procurement Clerk
SMALL PURCHASING
GS-11 D.C. Procurement Agent
GS-11 D.C. Procurement Agent
GS- 9 MDT Procurement Agent
GS- 7 I.D. Procurement Agent
GS- 5 I.D. Procurement Clerk
GS- 4 D.C. Procurement Clerk
FOOD SERVICE PURCHASING
GS- 7 D.C. Procurement Asst.
GS- 5 D.C. Procurement Asst.
GS- 5 I.A. Procurement Asst.
GS- 4 I.A. Procurement Clerk
GS- 4 I.A. Procurement Clerk
GS- 4 I.D. Procurement Clerk
GS- 4 I.A. Procurement Clerk
GS- 4 I.A. Procurement Clerk
GS- 4 D.C. Procurement Clerk

ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT X


DIRECTOR
LOGISTICAL SUPPORT
FOOD SERVICES BRANCH
DIRECTOR GS-14 D.C.
DEPUTY DIRECTOR GS-13 SAE
ADMINISTRATIVE AIDE GS- 7 D.C.
CLERK-TYPIST GS- 6 D.C.
PROCUREMENT BRANCH
STATE AGENCY UNIT
FOOD SUBSIDIES COORDINATOR GS-11 Reg. D. C.
FOOD PROGRAM SPECIALIST GS- 9 Reg. D. C.
FOOD PROGRAM SPECIALIST GS- 9 Reg. D.C.
FOOD PROGRAM ASSISTANT GS- 7 Reg. D.C.
FIELD INSPECTOR GS- 9 Reg. D.C.
FIELD INSPECTOR GS- 7 Rev. Acct.
CLERK GS- 4 Reg. D.C.
OPERATIONS UNIT
ASST DIRECTOR GS-12 Mayor
HOME ECONOMIST GS-11 Reg. D.C.
HOME ECONOMIST GS- 9 Mayor
PERSONNEL CLERK GS- 6 Reg. D.C.
ADULT ASST. GS- 4 Mayor
CLERK GS- 4 Reg. D.C.
ADMINISTRATIVE AIDE GS- 9 Reg. D.C.
AREA MANAGERS GS- 6 Reg. D.C.
AREA MANAGERS GS- 6 Rev. Acct.
PROGRAM SPECIALIST GS- 9 Rev. Acct.
PROGRAM ASSISTANT GS- 9 Rev. Acct.
SPECIAL ASSISTANT GS-13 Rev. Acct.
CAFETERIA WORKERS Per Diem Reg. D.C.
ADMINISTRATIVE SUPPORT UNIT
ACCOUNTANT GS-11 Rev. Acct.
ACCOUNTANT GS-11 SAE
ACCOUNTING MAINTENANCE CLERK GS- 6 Reg. D.C.
MISC ACCOUNTING CLERK GS- 5 Reg. D.C.
CLERK GS- 3 Reg. D.C.

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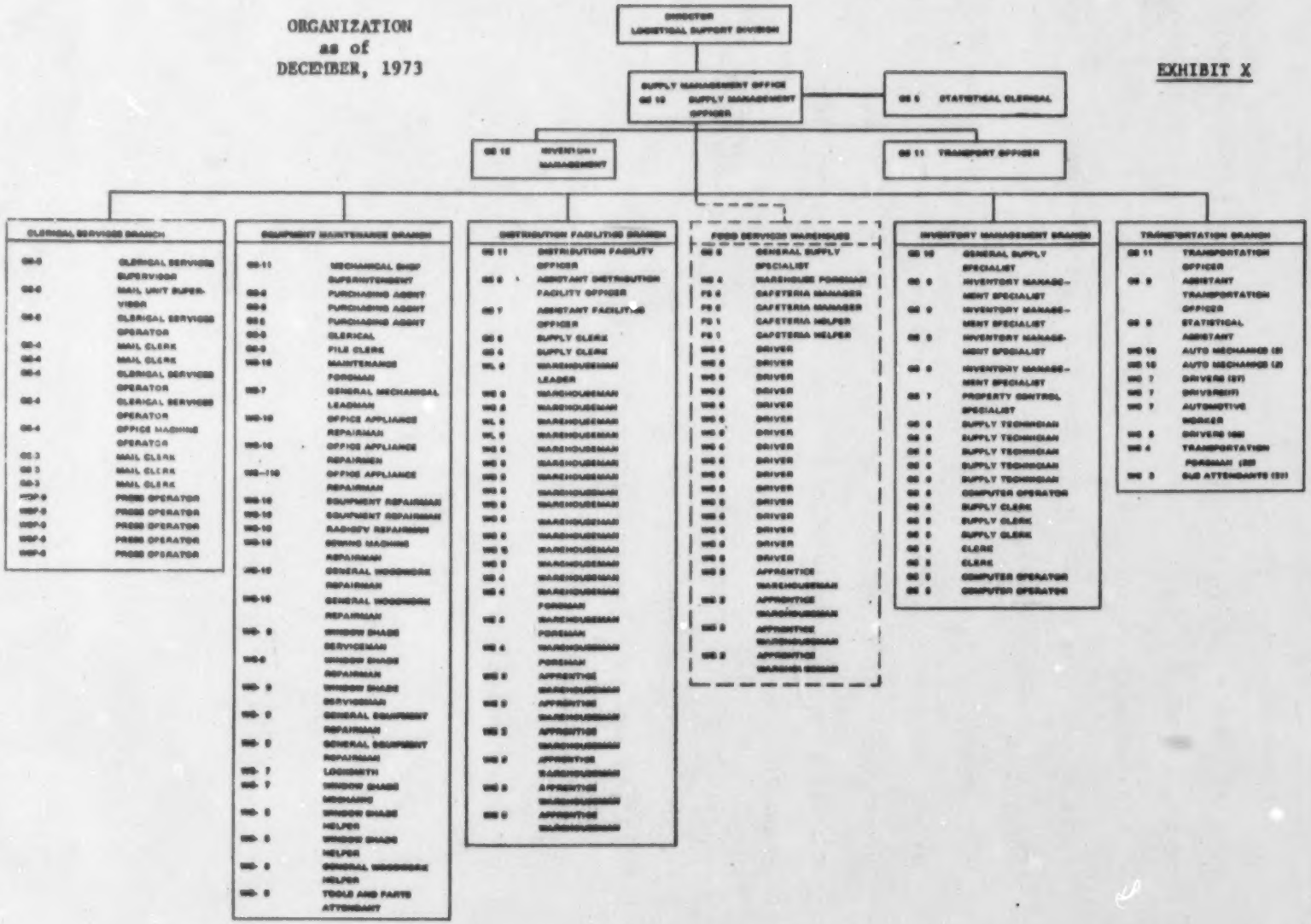
ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT X



DIVISION OF PERSONNEL

Presently, the Division of Personnel is staffed by eighty-one persons who perform services as indicated on the organizational chart, Exhibit XI.

As presently constituted, the Division provides minimum services to the system due to fragmentation of the personnel function throughout several other divisions.

In addition to the fragmentation of its responsibilities among several divisions, it suffers from the lack of existence of the proper formal structure, the proper distribution of its present resources, as well as insufficient resources to carry out its responsibilities.

In order to correct these deficiencies, the responsibilities of the division have been defined as follows:

- Plans and coordinates the recruitment of classified personnel
- Plans and coordinates the recruitment and selection of qualified professional personnel
- Provides for and supervises the maintenance of classified and professional employee personnel records

- Provides an active program of teacher recruitment
- Coordinates practice teaching in the schools
- Maintains a salary administration program, develops and recommends salary schedules, and advises administrators on salary matters
- Interprets personnel policies to all employees of the school system
- Supervises the administration of the grievance procedure for all employees
- Assists the staff committee in collective bargaining negotiations
- Evaluates the effectiveness of personnel policies and procedures
- Implements all Board of Education policies related to personnel functions
- Serves as the custodian of all Board of Education personnel records
- Participates in the development of the divisional budget

- Transmits procedures, rules, and other appropriate information to central office and field units
- Provides representatives on committees established by other divisions or offices
- Prepares or assists in the preparation of board reports
- Prepares personnel bulletins for weekly dissemination
- Provides printed materials about personnel matters to colleges, universities, and other interested individuals or groups
- Conducts city- and regional-wide inservice sessions
- Assists field administrators through individual conferences, written communications and meetings held in the field
- Prepares follow-up correspondence recapitulating the results of conferences
- Provides liaison between divisions and non-board agencies such as the Civil Service Commission, the D. C. Department of Personnel and the several union organizations

- Meets with Board of Examiners on personnel needs and staffing

- To develop and maintain an effective employee relations program for the District of Columbia Public Schools. Overall responsibility for all employee relations functions as well as the negotiations and management advisory functions entailed in dealing with employee organizations

- Provides personnel services relating to the employment and assignment of substitute teachers

- Reviews and processes requests for leaves of absence

- Provides assistance to personnel planning retirement

- Coordinates staff services, including counseling

- Interprets policies and procedures for the classified staff

- Serves as the official contact between the District of Columbia Public Schools and the Civil Service Commission

- Provide for classification of classified personnel

- Plans and implements the recruitment of personnel and cooperates with Regional Superintendents and the Staff Development Office in their training

- Provides administrative services to the regions

- Maintains eligibility lists for positions

To carry out the responsibilities delineated above, the reorganized division will be structured as shown in Exhibit XI.

Essentially, the reorganized Division of Personnel will centralize all personnel functions now performed throughout the school system. Personnel operating in the divisions of the school system who perform personnel functions will be transferred and absorbed in the reorganized Personnel Division. Personnel presently responsible for the handling of employee grievances will be transferred under the Assistant Superintendent, Division of Personnel, thus separating the lower echelon grievance handling from the Labor Negotiations functions.

The functions of certification for professional employees will be transferred from the division and transferred to the new Division of State Administration.

ORGANIZATION
as of
DECEMBER, 1973

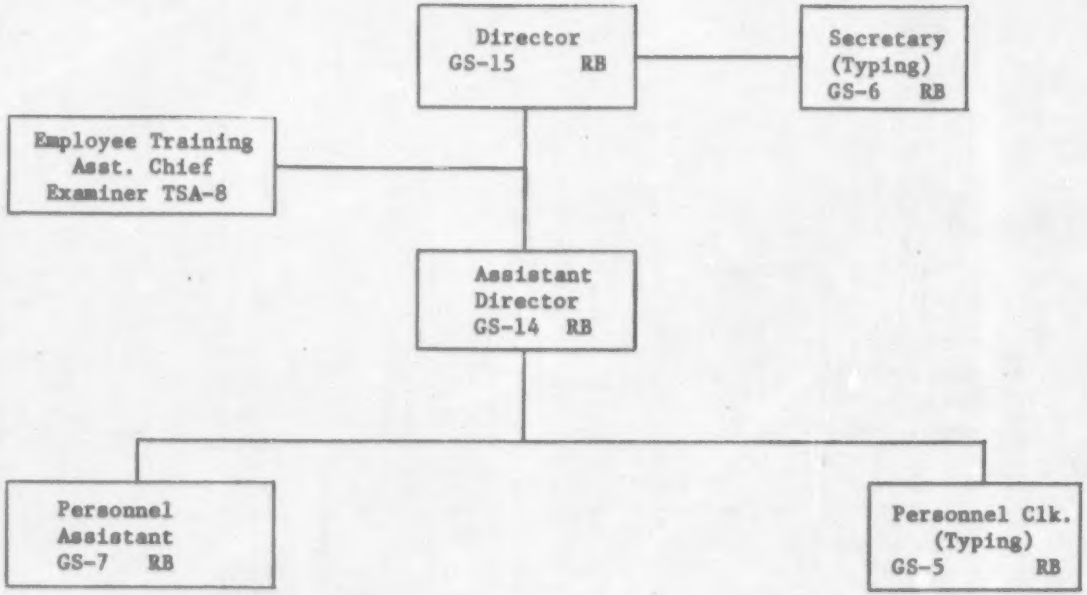
DIVISION OF PERSONNEL

EXHIBIT XI

ORGANIZATION
as of
DECEMBER, 1973

DIVISION OF PERSONNEL

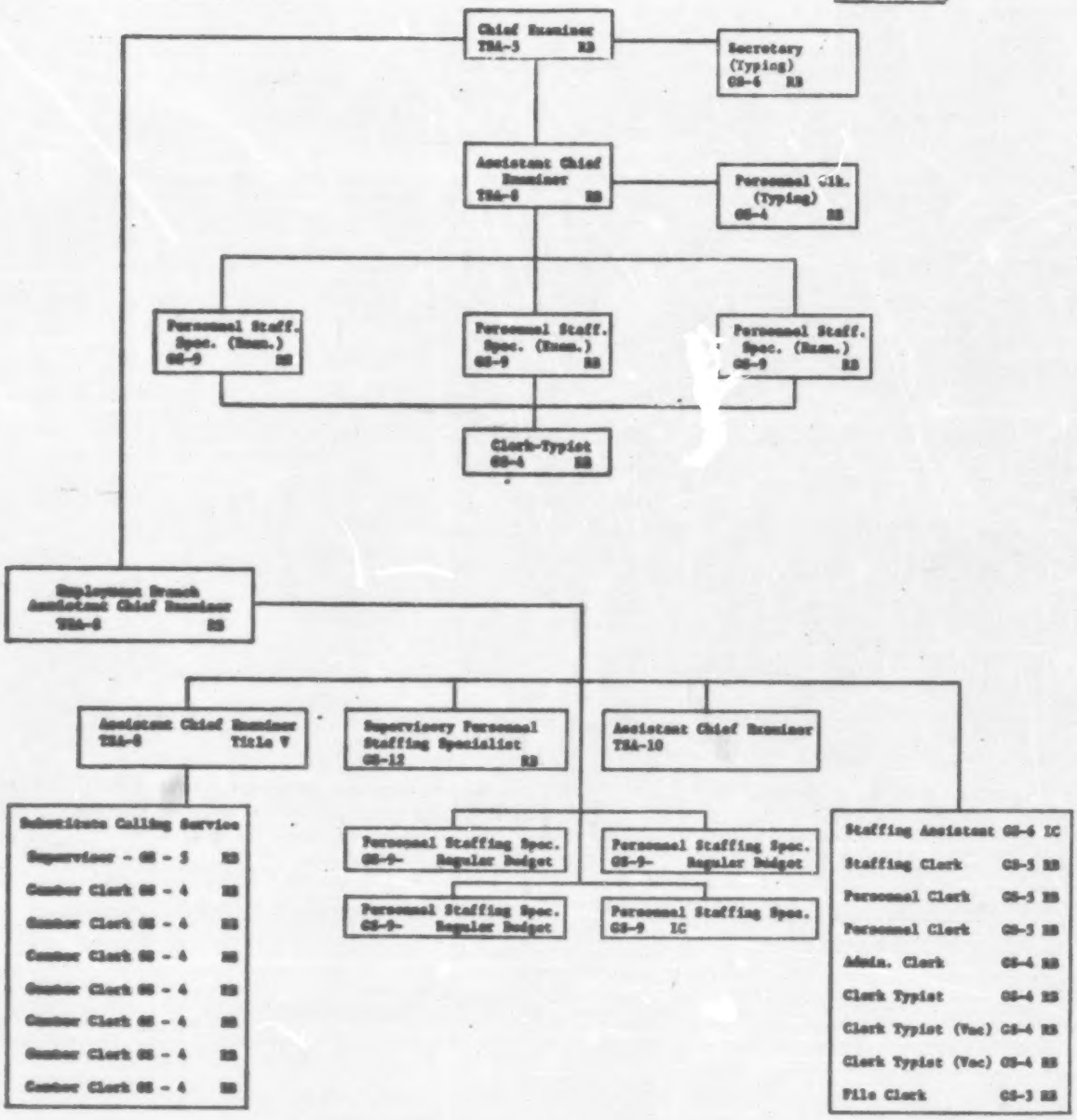
EXHIBIT XI



ORGANIZATION
as of
DECEMBER, 1973

BOARD OF EXAMINERS

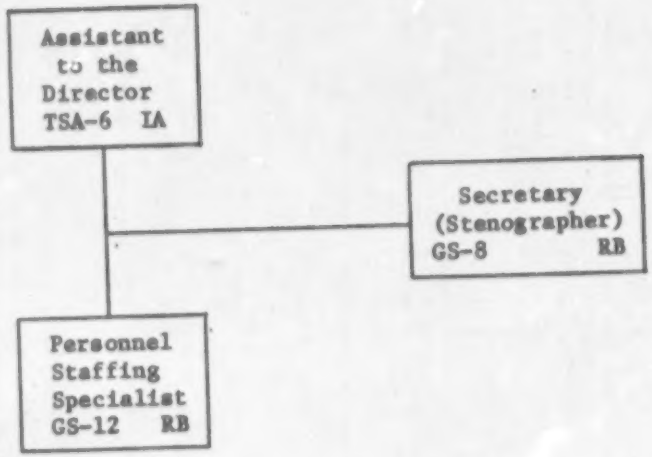
EXHIBIT XI



ORGANIZATION
as of
DECEMBER, 1973

OFFICER PROMOTIONS BRANCH

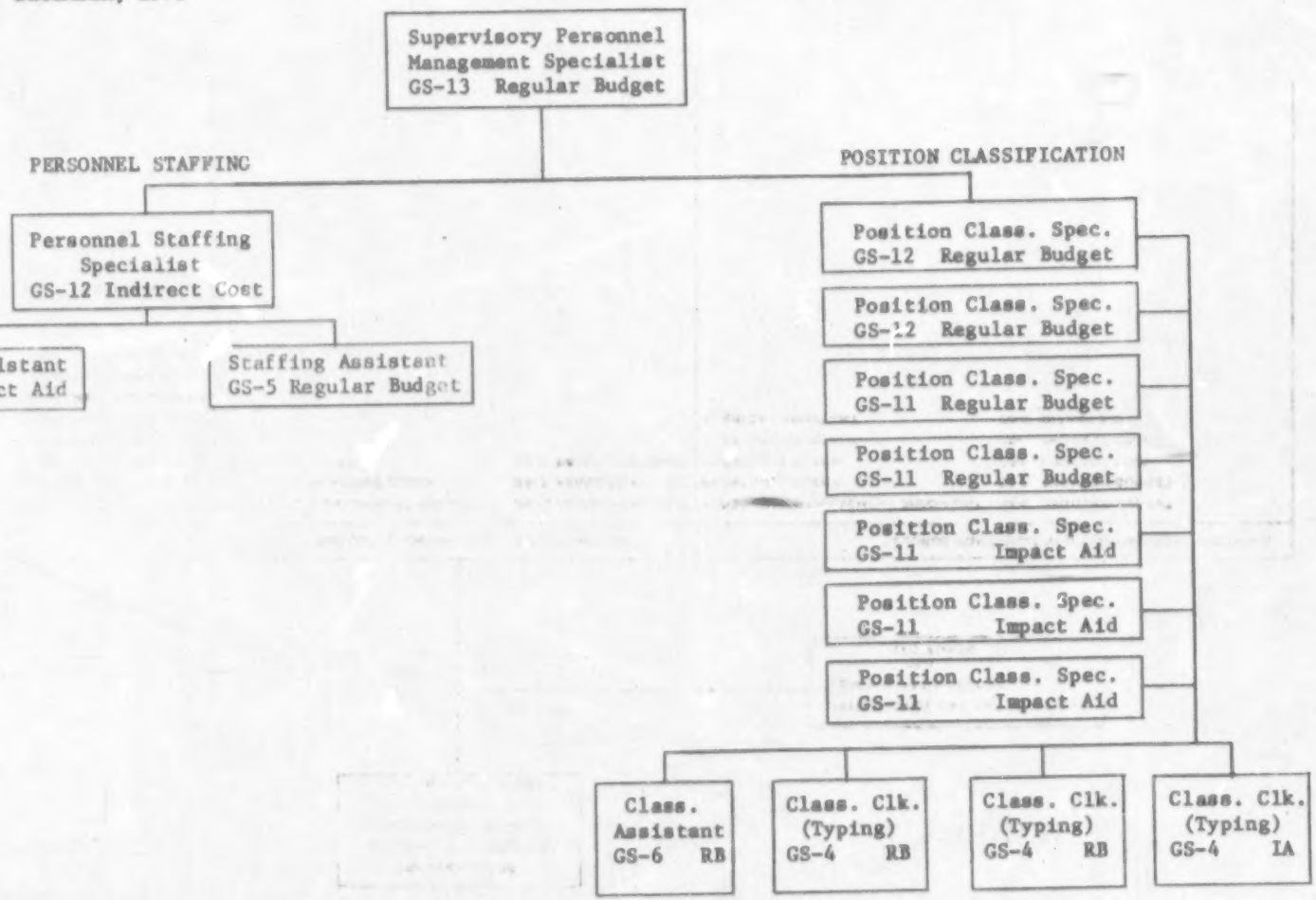
EXHIBIT XI



ORGANIZATION
as of
DECEMBER, 1973

PERSONNEL SUPPORT BRANCH

EXHIBIT XI


Supervisory Personnel Management Specialist GS-13 Regular Budget
PERSONNEL STAFFING
POSITION CLASSIFICATION
Personnel Staffing Specialist GS-12 Indirect Cost
Staffing Assistant GS-6 Impact Aid
Staffing Assistant GS-5 Regular Budget
Position Class. Spec. GS-12 Regular Budget
Position Class. Spec. GS-12 Regular Budget
Position Class. Spec. GS-11 Regular Budget
Position Class. Spec. GS-11 Regular Budget
Position Class. Spec. GS-11 Impact Aid
Position Class. Spec. GS-11 Impact Aid
Position Class. Spec. GS-11 Impact Aid
Class. Assistant GS-6 RB
Class. Clk. (Typing) GS-4 RB
Class. Clk. (Typing) GS-4 RB
Class. Clk. (Typing) GS-4 IA

DIVISION OF PERSONNEL

ADMINISTRATIVE SERVICES BRANCH

ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT XI

BRANCH CHIEF
SUPERVISORY PERSONNEL
MANAGEMENT SPECIALIST
GS-12
REGULAR BUDGET

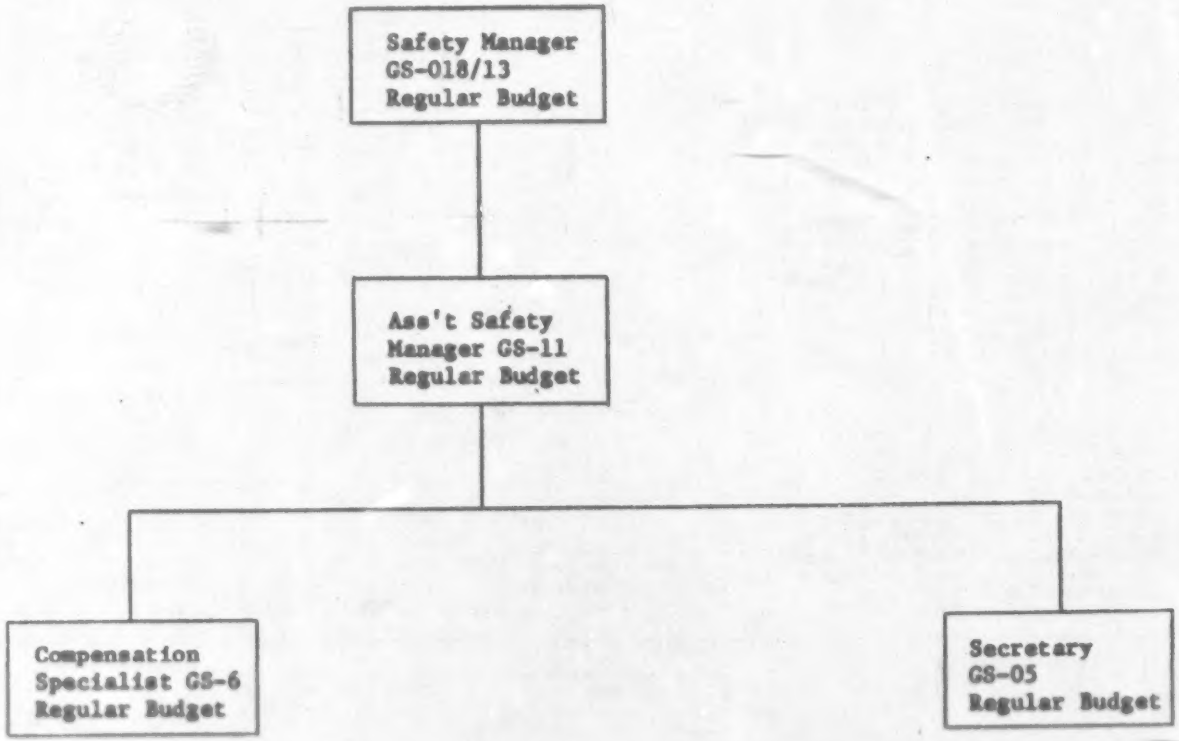
RECEPTIONIST AND INFORMATION
ADMINISTRATIVE CLERK
GS-4
NYC FUNDS

PERSONNEL ACTIONS SECTION			EMPLOYEE COUNSELING SERVICES SECTION			RECORDS MGMT-FILES-VERIFICATION-RESEARCH-MAIL		
PERSONNEL SERVICES SUPERVISOR	GS-8	REGULAR BUDGET	PERSONNEL MANAGEMENT SPECIALIST	GS-12	REGULAR BUDGET	PERSONNEL MANAGEMENT SPECIALIST	GS-9	REGULAR BUDGET
PERSONNEL CLERK	GS-7	REGULAR BUDGET	EMPLOYEE-RELATIONS CLERK	GS-7	REGULAR BUDGET	PERSONNEL CLERK	GS-6	REGULAR BUDGET
ADMINISTRATIVE CLERK-TYPING	GS-6	REGULAR BUDGET	PERSONNEL CLERK	GS-6	REGULAR BUDGET	PERSONNEL CLERK	GS-6	INDIRECT COST
ADMINISTRATIVE CLERK-TYPING	GS-6	REGULAR BUDGET				CLERICAL ASSISTANT	GS-4	INDIRECT COST
ADMINISTRATIVE CLERK-TYPING	GS-6	REGULAR BUDGET				CLERICAL ASSISTANT	GS-4	IMPACT AID
PERSONNEL CLERK	GS-6	REGULAR BUDGET						
PERSONNEL CLERK	GS-4	REGULAR BUDGET						
PERSONNEL CLERK	GS-4	REGULAR BUDGET						
CLERK	GS-6	SSA FUNDS						

SAFETY MANAGEMENT BRANCH

ORGANIZATION
as of
DECEMBER, 1973

EXHIBIT XI



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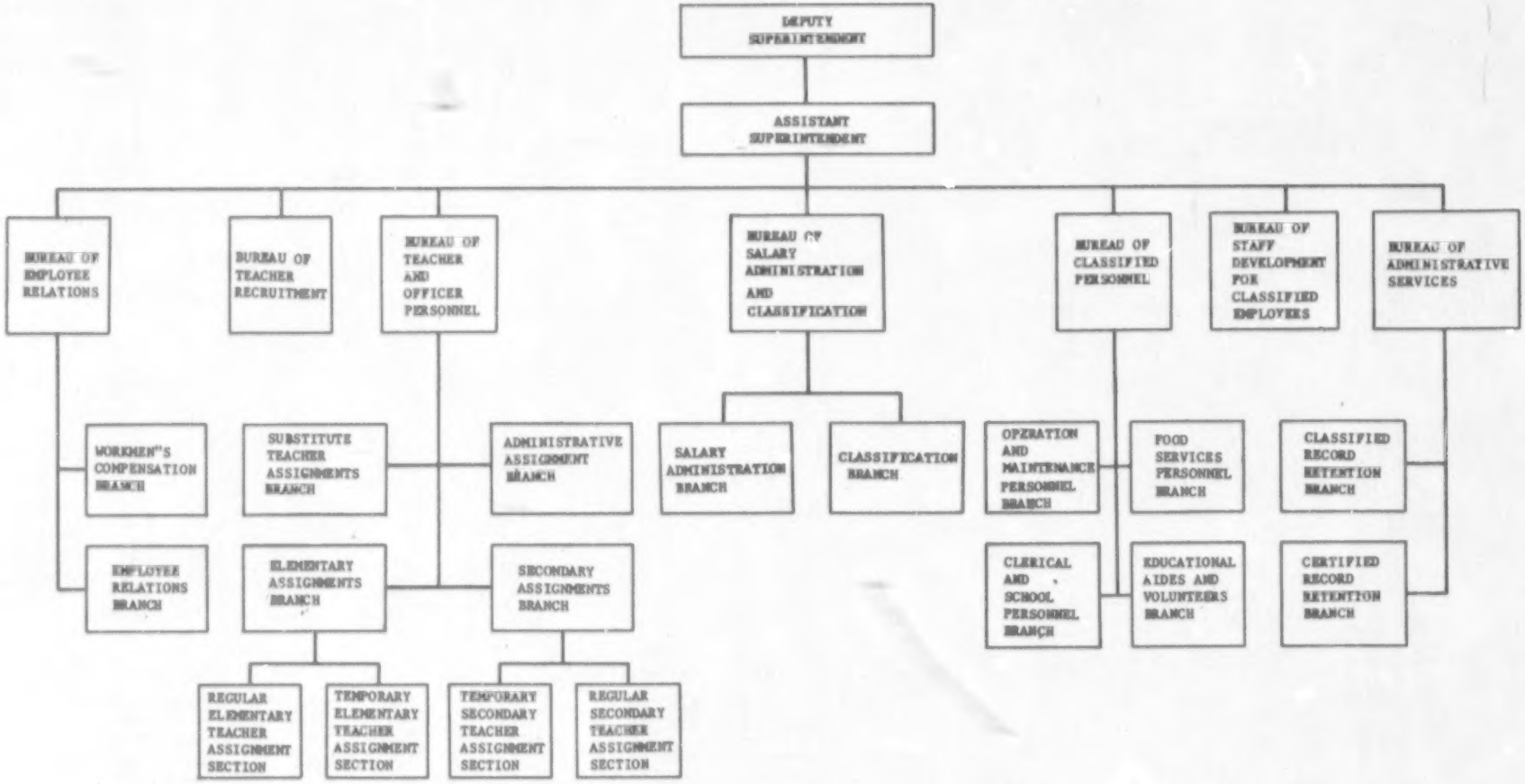
REVISED ORGANIZATION
AS OF
MAY, 1974

EXHIBIT XII

DIVISION OF PERSONNEL


DEPUTY SUPERINTENDENT
ASSISTANT SUPERINTENDENT
BUREAU OF EMPLOYEE RELATIONS
BUREAU OF TEACHER RECRUITMENT
BUREAU OF TEACHER AND OFFICER PERSONNEL
BUREAU OF SALARY ADMINISTRATION AND CLASSIFICATION
BUREAU OF CLASSIFIED PERSONNEL
BUREAU OF STAFF DEVELOPMENT FOR CLASSIFIED EMPLOYEES
BUREAU OF ADMINISTRATIVE SERVICES
WORKMEN'S COMPENSATION BRANCH
SUBSTITUTE TEACHER ASSIGNMENTS BRANCH
ADMINISTRATIVE ASSIGNMENT BRANCH
SALARY ADMINISTRATION BRANCH
CLASSIFICATION BRANCH
OPERATION AND MAINTENANCE PERSONNEL BRANCH
FOOD SERVICES PERSONNEL BRANCH
CLASSIFIED RECORD RETENTION BRANCH
EMPLOYEE RELATIONS BRANCH
ELEMENTARY ASSIGNMENTS BRANCH
SECONDARY ASSIGNMENTS BRANCH
CLERICAL AND SCHOOL PERSONNEL BRANCH
EDUCATIONAL AIDES AND VOLUNTEERS BRANCH
CERTIFIED RECORD RETENTION BRANCH
REGULAR ELEMENTARY TEACHER ASSIGNMENT SECTION
TEMPORARY ELEMENTARY TEACHER ASSIGNMENT SECTION
TEMPORARY SECONDARY TEACHER ASSIGNMENT SECTION
REGULAR SECONDARY TEACHER ASSIGNMENT SECTION

DIVISION OF FINANCIAL PLANNING AND BUDGET PREPARATION

In order to provide for the orderly servicing of all sources of funding in the school system as well as provide a staff for long-range monetary planning, it is necessary to separate the operational functions from the planning functions.

In order to provide these fiscal planning services, some functions previously identified in the Division of Budget are being reassigned to the Division of Financial Planning and Budget Preparation.

The responsibilities of the Division of Financial Planning and Budget Preparation are defined as:

- Meets with the Deputy Superintendent of Schools to discuss operational planning and procedures of the school system and budget preparation
- Confers with the Deputy Superintendent on major financial matters
- Schedules conferences with Regional Superintendent on budget matters
- Conducts long-range financial planning for the Board of Education and for distinct components under the Board of Education

- Coordinates the implementation of Program Budgeting and other financial plans
- Conducts in-service seminars related to financial planning and budget preparation
- Develops procedures and formulas for use in budget preparation
- Prepares the annual tentative and final line-item school budgets, together with necessary supporting schedules
- Coordinates the preparation of line items in the school budget for federal- and grant-funded programs
- Maintains the planning budget files to reflect changes which occur throughout the year
- Continues the basic developmental work required for a Program Budgeting System
- Prepares comparative and statistical financial studies to assist in developing legislative proposals and short- and long-range educational and facilities plans

- Develops models to assist in decisions concerning the allocation of funds to programs and to better forecast financial needs and revenues

- Prepares an annual program budget booklet and supporting data for the regular budget

- Prepares all supporting documents for budgetary submission to legislative bodies

- Confers with the Deputy Superintendent on major financial policies

- Coordinates with Deputy Superintendent on budget preparation

- Distributes formal instructions, guidelines, and forms to schools, and regional and central offices, requesting input data for use in budget preparation

- Meets with division heads and their staffs concerning the school budget

- Meets on a regular basis, as part of the Deputy Superintendent's staff

- Prepares the annual budget of the school system in accordance with the requirements of the District of Columbia Government

- Develops and prepares the Annual Operating Budget in accordance with an established criteria of the Program, Planning, Budgeting System for the Public Schools

- Prepares the various budgetary presentations which must be made by the Superintendent to the legislative bodies and the general public

- Coordinates with the Division of Control on all fiscal matters and reports

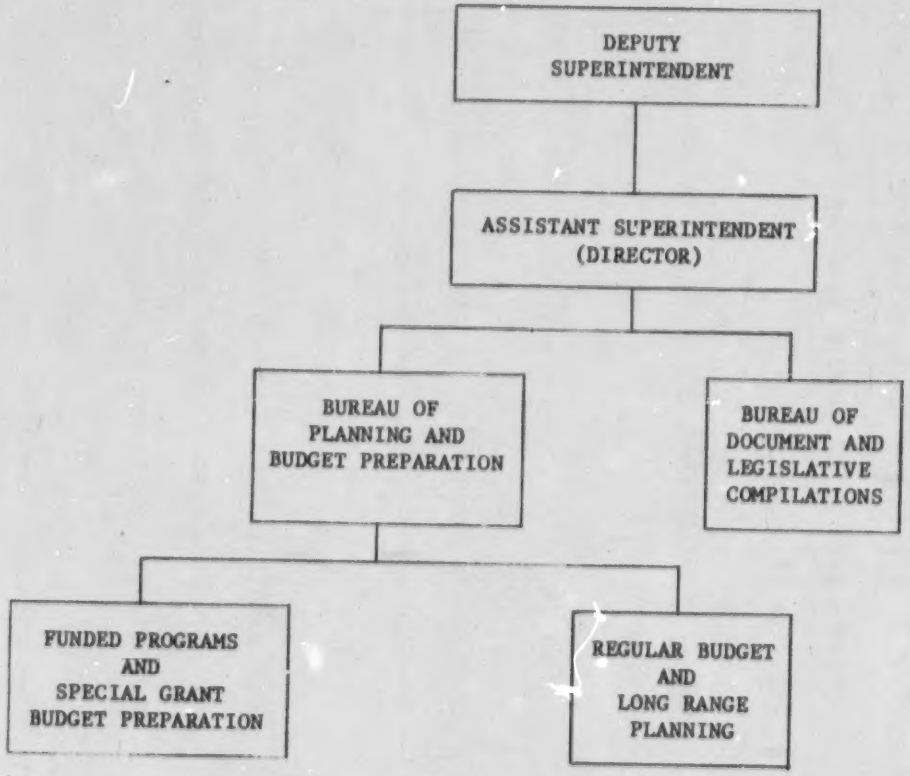
- Disseminates fund allocations based upon various formulas to the school units, regional offices, and central offices

In order to carry out these responsibilities, the Division of Financial Planning and Budget Preparation would consist of the bureaus and sections as detailed in Exhibit XIII.

ORGANIZATION AS OF
MAY, 1974

DIVISION OF FINANCIAL PLANNING
AND BUDGET PREPARATION

EXHIBIT XIII


DEPUTY SUPERINTENDENT
ASSISTANT SUPERINTENDENT (DIRECTOR)
BUREAU OF PLANNING AND BUDGET PREPARATION
BUREAU OF DOCUMENT AND LEGISLATIVE COMPILATIONS
FUNDED PROGRAMS AND SPECIAL GRANT BUDGET PREPARATION
REGULAR BUDGET AND LONG RANGE PLANNING

DIVISION OF CONTROL

As previously stated, the need exists, as stressed throughout the recommendations of the various studies, for greater fiscal control and financial integrity.

In order to bring into being a viable unit to deal with the vast task of properly forecasting fund needs and controlling fund expenditures in all areas and at all levels of expenditures, the Division of Control is to be created, headed by a Controller. The responsibilities of this office are being defined as follows:

- Performs general accounting functions for the District of Columbia Public Schools
- Provides for payroll functions in the school system
- Audits the school system's accounts
- Establishes procedures for the reimbursement of expended school funds from federal and local agencies
- Maintains financial controls over the expenditures of the school system's funds to insure that budget expenditure limits are not exceeded

- Coordinates all transfers of funds in the school budget
- Files necessary financial reports with the District of Columbia Board of Education, the General Superintendent, the Deputy Superintendent, and central office and field staff
- Prepares estimates of review for the school budget
- Provides payment service to all school system vendors and contractors
- Participates in total budget preparation
- Prepares the divisional budget
- Confers with other divisional administrators on operational procedures
- Assigns division staff to standing and special policy committees
- Provides written directives, with the approval of the Deputy Superintendent as required in coordinating financial policy

- Performs audit reports on field non-appropriated accounts
- Provides annual audit reports to field units on school internal accounts
- Prepares monthly financial report of expenditures for submission to the Board of Education
- Provides monthly report of the status of accounts distributed to central office and field units
- Submits monthly report of schools audited to the Superintendent, which is also included in monthly financial reports
- Prepares financial statements and other materials for presentation to the Board of Education, staff, the legislature, and other groups and individuals
- Analyzes actual expenditures to provide better information for estimating future costs
- Holds meetings with all field personnel as needed
- Meets with central office and regional staff
- Distributes division's reports to all units

- Prepares all special and regular financial analyses and reports as required

- Supervises and audits all requests for reimbursements as well as collections

- Establishes and maintains controls over all school funds as well as assuming responsibility for the Annual Audit Reports for all schools within the system

- Is accountable for all financial accounting responsibilities of the school system

- Maintains and processes the various account records and prepares the necessary reports and statements in accordance with the various laws and regulations and requirements of the District of Columbia Government

- Supervises the preparation of monthly and periodical journal entries for charges to accounts as required

- Works with staff in the resolution of all financial accounting problems

- Assumes responsibility for all periodic and regular interval audits

- Assumes responsibility for those activities and functions necessary for the processing of payrolls in cooperation with the Central Payroll Division of the District of Columbia Government

- Assumes responsibility for payroll matters relative to all employees of the school system

- Assumes responsibility for all reports and other payroll processes necessary to insure the most efficient payroll system

- Works with all divisions and offices of the school system in the establishment of budgetary controls and spending plans

- Prepares the necessary annual reports

- Maintains, updates, and reports the number of full-time equivalent positions and salaries authorized by the budget control unit for each budget activity and federal project

- Approves or rejects all personnel authorization forms based on the availability or lack of availability, respectively, of authorized positions and dollars within the specific budget activities and projects

- Reconciles the numbers of positions and annual salaries on the report of filled positions and salaries with the payroll files maintained by the City

- Notifies the payroll accounting units and the appropriate activity managers of those instances when individuals are being charged to budget codes in excess of authorized positions and/or funds

- Furnishes Regional Superintendents with periodic reports of position control in the regions

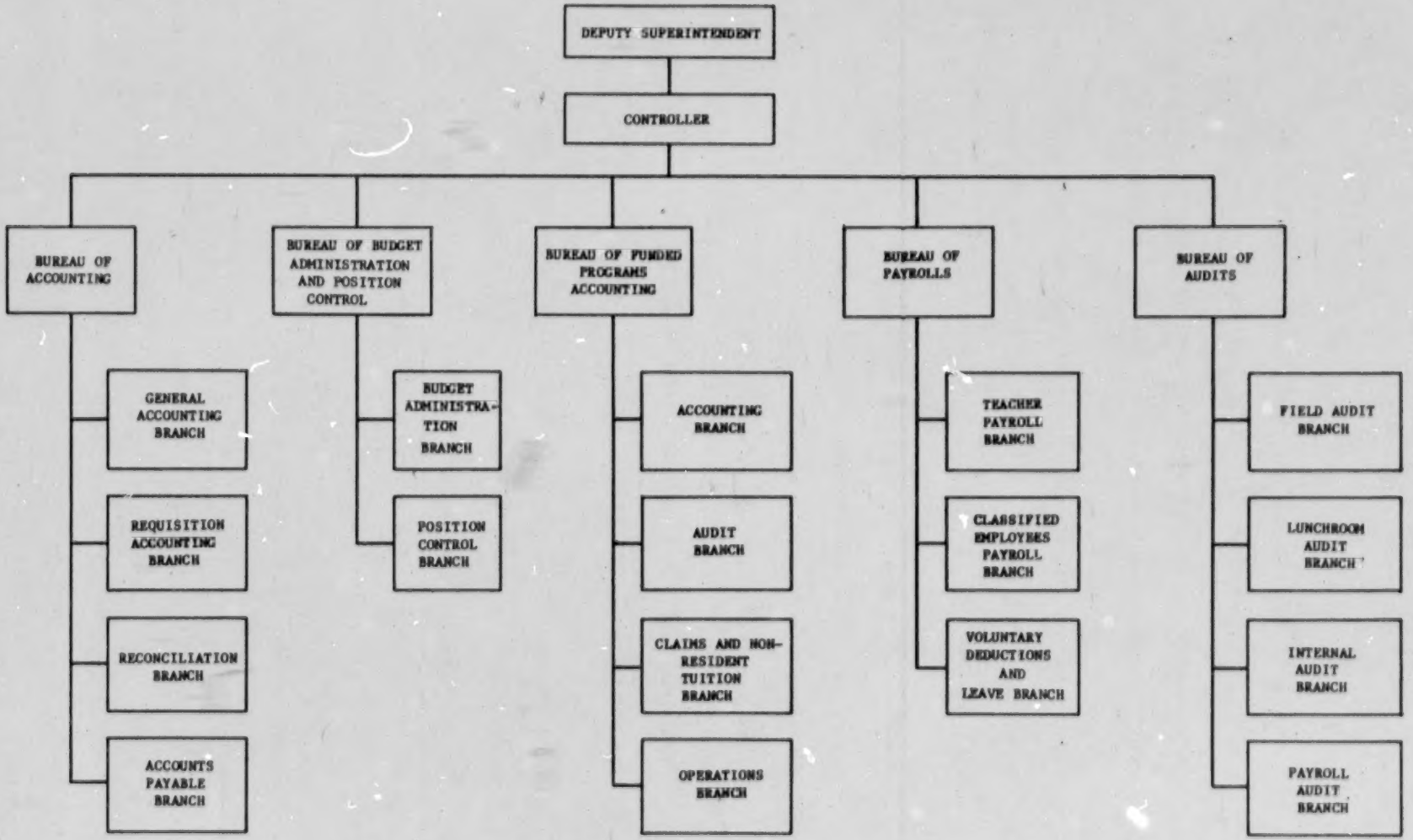
- Reports, in comparison to current authorizations, the current status of filled positions and salaries of incumbents, and vacant positions and available salary funds for each budget activity and federal project

In order to carry out these responsibilities, the Division of Control would consist of the bureaus and sections as detailed in Exhibit XIV.

ORGANIZATION AS
OF MAY, 1974

EXHIBIT XIV

DIVISION OF CONTROL



DIVISION OF STATE ADMINISTRATION

Because of the uniqueness of the status of the city of the District of Columbia, in its relationship to the federal government, it becomes apparent that there are certain functions implied or delegated which causes the City and its agencies to act as a State Agency.

There exists a need within the administrative structure to provide for the systematic administration of these functions.

This need must be met through the establishment of this unit which will take responsibility for administration of all federally funded program, including agricultural funded programs, monitoring the in-place programs; submitting required documents to the funding agencies; and coordination of proposal development, submission and the seeking of funds from any and all funding sources.

In addition to the need for pulling in all funded programs under a central administrative unit, as well as providing for the independence of the certification process, basically the responsibilities of this unit will be:

- Serves as the official liaison with special funding agencies

- Identifies sources of funding for all proposals developed by schools and administrative units

- Provides technical assistance to all units in the development of proposals

- Provides guidelines to units implementing proposals that have been approved by funding agencies

- Conducts on-going program audits to ensure that programs approved for funding are implemented in accordance with the proposal as developed, with funding agency guidelines, and with the rules of the Board of Education

- Provides financial management services to ensure that funds are appropriately and efficiently expended in compliance with the proposal as approved, and with legislative and funding agency directives

- Provides administrative services to ensure timely and appropriate implementation of programs by field units

- Provides appropriate services to assist funded programs and to meet funding agency requirements

- Prepares budgets for funded programs

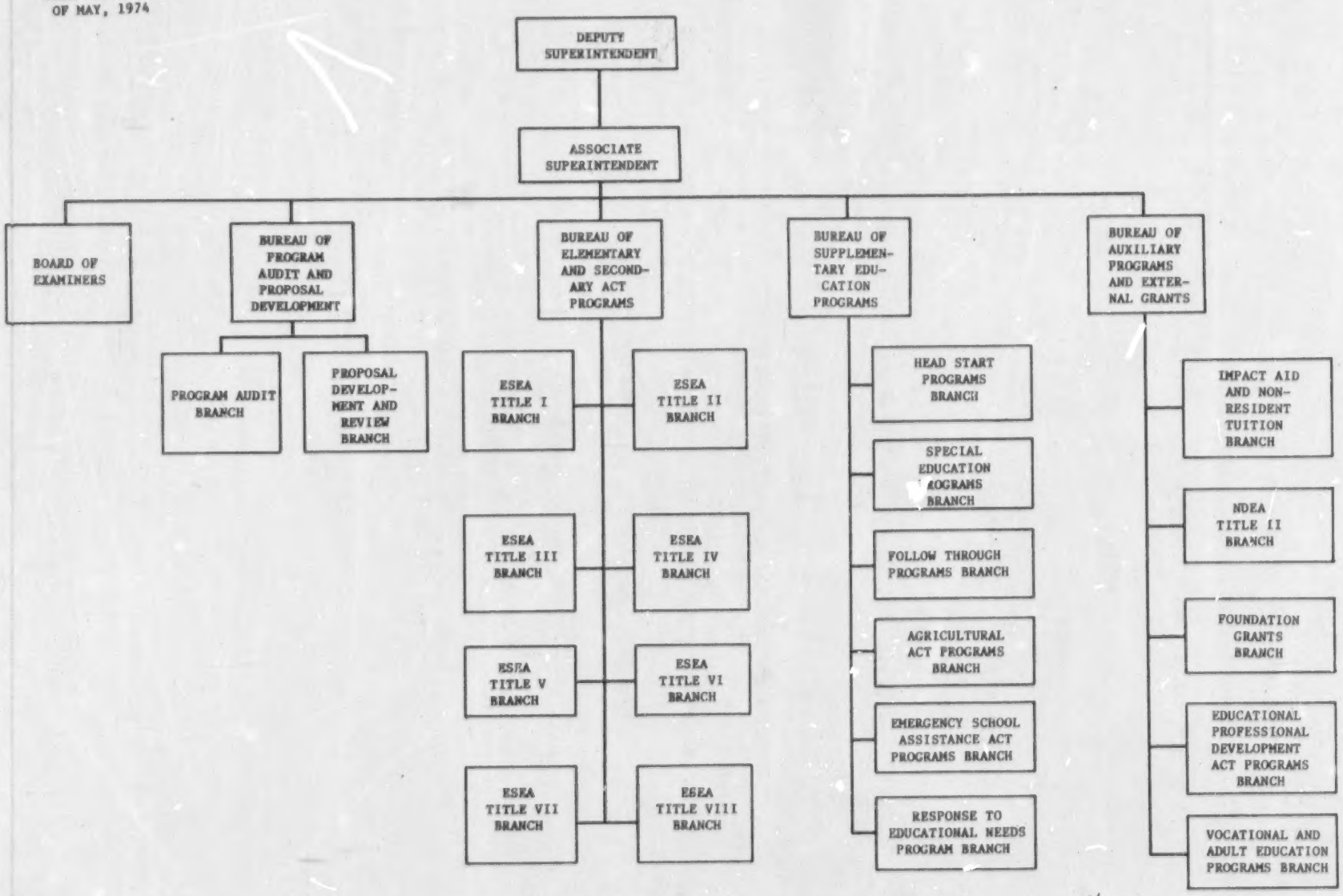
- Works with appropriate staff in the dissemination of evaluation data and information concerning funded programs
- Establishes standards for the issuance of all certificates
- Evaluates credentials for the purpose of certification
- Establishes procedures for obtaining certificates
- Issues annual circulars of information, listing rules and requirements for obtaining certificates
- Establishes criteria for professional license
- Determines status of all non-resident students
- Determines basis for assessing tuition for non-resident students

The Division of State Administration will be established in the Office of the Superintendent.

ORGANIZATION AS OF MAY, 1974

DIVISION OF STATE ADMINISTRATION

EXHIBIT XV


DEPUTY SUPERINTENDENT
ASSOCIATE SUPERINTENDENT
BOARD OF EXAMINERS
BUREAU OF PROGRAM AUDIT AND PROPOSAL DEVELOPMENT
PROGRAM AUDIT BRANCH
PROPOSAL DEVELOPMENT AND REVIEW BRANCH
BUREAU OF ELEMENTARY AND SECONDARY ACT PROGRAMS
ESEA TITLE I BRANCH
ESEA TITLE II BRANCH
ESEA TITLE III BRANCH
ESEA TITLE IV BRANCH
ESEA TITLE V BRANCH
ESEA TITLE VI BRANCH
ESEA TITLE VII BRANCH
ESEA TITLE VIII BRANCH
BUREAU OF SUPPLEMENTARY EDUCATION PROGRAMS
HEAD START PROGRAMS BRANCH
SPECIAL EDUCATION PROGRAMS BRANCH
FOLLOW THROUGH PROGRAMS BRANCH
AGRICULTURAL ACT PROGRAMS BRANCH
EMERGENCY SCHOOL ASSISTANCE ACT PROGRAMS BRANCH
RESPONSE TO EDUCATIONAL NEEDS PROGRAM BRANCH
BUREAU OF AUXILIARY PROGRAMS AND EXTERNAL GRANTS
IMPACT AID AND NON-RESIDENT TUITION BRANCH
NDEA TITLE II BRANCH
FOUNDATION GRANTS BRANCH
EDUCATIONAL PROFESSIONAL DEVELOPMENT ACT PROGRAMS BRANCH
VOCATIONAL AND ADULT EDUCATION PROGRAMS BRANCH

DIVISION OF SECURITY AND SAFETY

The Superintendent's 120-Day Report indicates that the short- and long-range goals of the school security program as being geared to:

- Improve the methods of preventing crime in the District of Columbia Public School System so that the incidence of crime will be reduced

- Enrich and expand the program with more community involvement in the resolution of security-related problems

- Provide remedial and supportive prevention services which will have impact upon those students who either have or may become involved in criminal and socially aberrant acts in the learning environment

- Provide additional security for students, employees, and legitimate visitors in all school facilities under the jurisdiction of the D. C. Board of Education and at athletic contests, programs, meetings and other events sponsored by the District of Columbia Public Schools

- Encourage more in-depth community involvement in the development and implementation of security-related projects and programs by establishing a viable Security Committee in each school which will include in its membership three representatives from the student body, three teachers, one administrator, three community representatives, and the school community aide

- Improve the communication among school personnel, law enforcement authorities, community leaders, and other District and Federal government agencies regarding security matters by scheduling regular meetings with representatives from each liaison area to discuss problems of mutual concern and ways to alleviate them

- Provide alternatives to the arrest of marginal juvenile offenders by counseling of the youths and referral to service agencies by the investigator-counselors or para-professional personnel

- Establish a communications system that will aid in quicker responses to requests for security services by establishing a base station, using two-way mobile communication trucks, hiring ten additional night patrolmen, two shift supervisors and one supervisor to provide closer security surveillance of school property during the hours the schools and offices are unoccupied

Based on the identified goals, the responsibilities of this office are as follows:

- To develop, in cooperation with Regional Superintendents, principals, and heads of divisions security plans for approval by the Deputy Superintendent

- To develop, in cooperation with the Staff Development Office, in-service training programs for regional personnel, principals, teachers and custodial staff

- To develop, in cooperation with the Staff Development Office, in-service training programs for security personnel

- To work closely with building principals in coordinating security programs
- To provide reports, as necessary
- To make recommendations, in cooperation with Regional Superintendents, Principals, and heads of divisions to the Deputy Superintendent for Management concerning the purchase of security equipment appropriate to the needs of the schools
- To protect staff and pupils in the schools
- To protect the school property
- To advise the Superintendent, through the Deputy Superintendent for Management, on all security matters
- To provide security for meetings and school activities as required
- To implement emergency action as necessary
- To counsel students with respect to security matters

- To maintain liaison with the Police Department, as required
- To plan and establish an in-service program for students
- To provide mobility for security aides
- Operate a night surveillance crew responsible for the security of unoccupied buildings

In addition to responsibilities of personnel security, the responsibilities related to school safety are being joined with those of personnel security as a part of this division.

The identified safety responsibilities are:

- Perform occupational safety and health audits in all Board of Education-operated facilities
- Investigate all reports of vehicular accidents
- Review and analyze all job-incurred injuries
- Counsel and advise employees regarding rehabilitation and job rights

- Conduct meetings with various staff levels as needed to provide background information on the functions and services being rendered by the Safety Administration Section

- Conduct safety awareness training sessions for staff at all levels

- Design and distribute safety policy and procedures as deemed necessary

- Develop and approve emergency evacuation plans for all Board of Education facilities to assure that they are in compliance with the Fire Prevention Bureau's regulations

- Analyze all pupil injury reports for the school system

- Perform follow-up inspections to the Industrial Safety Board's inspections of District of Columbia Public School facilities

- Participate in system-wide committees on safety

The organizational structure to implement the security and safety goals in set forth in Exhibit XVI.

ORGANIZATION
as of
DECEMBER, 1973

SECURITY OFFICE

EXHIBIT XVI

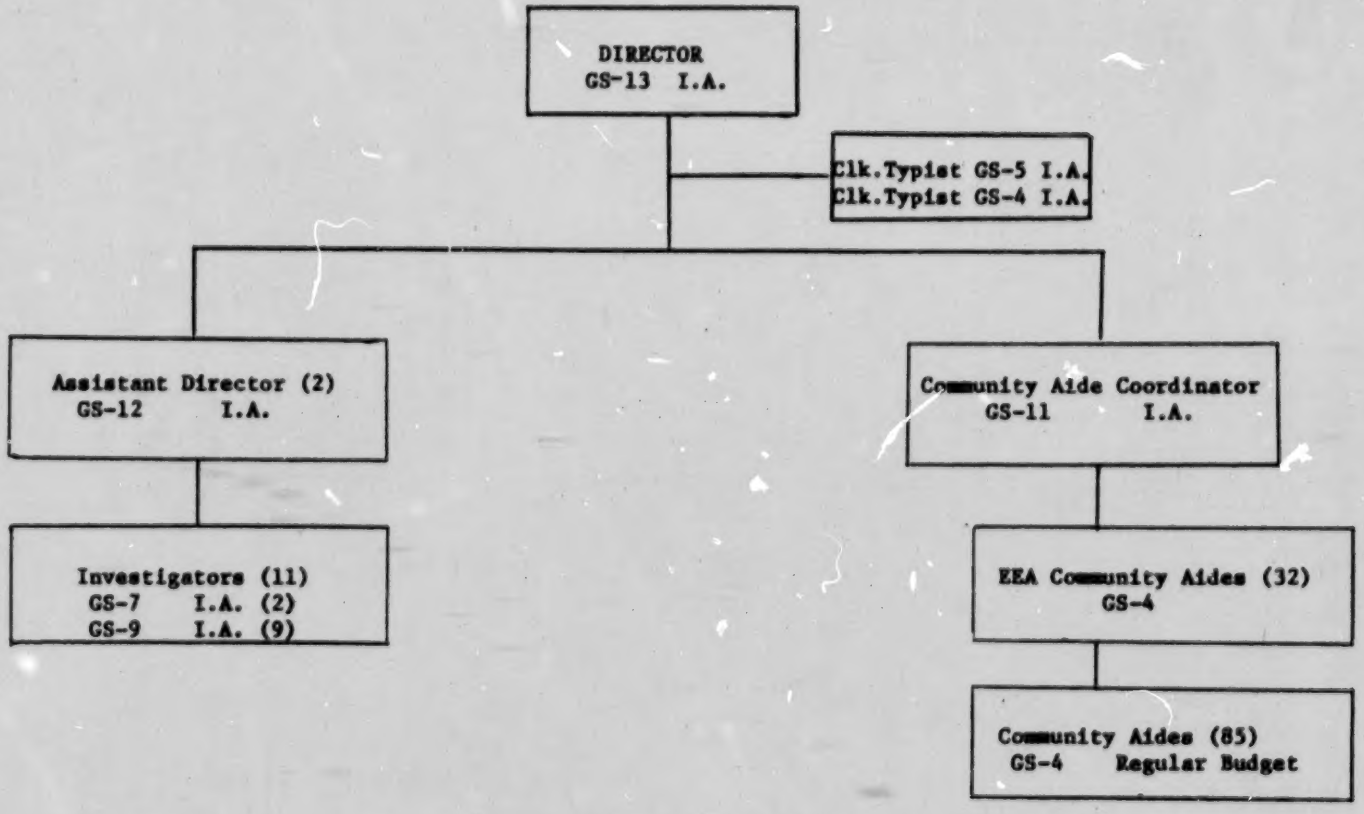
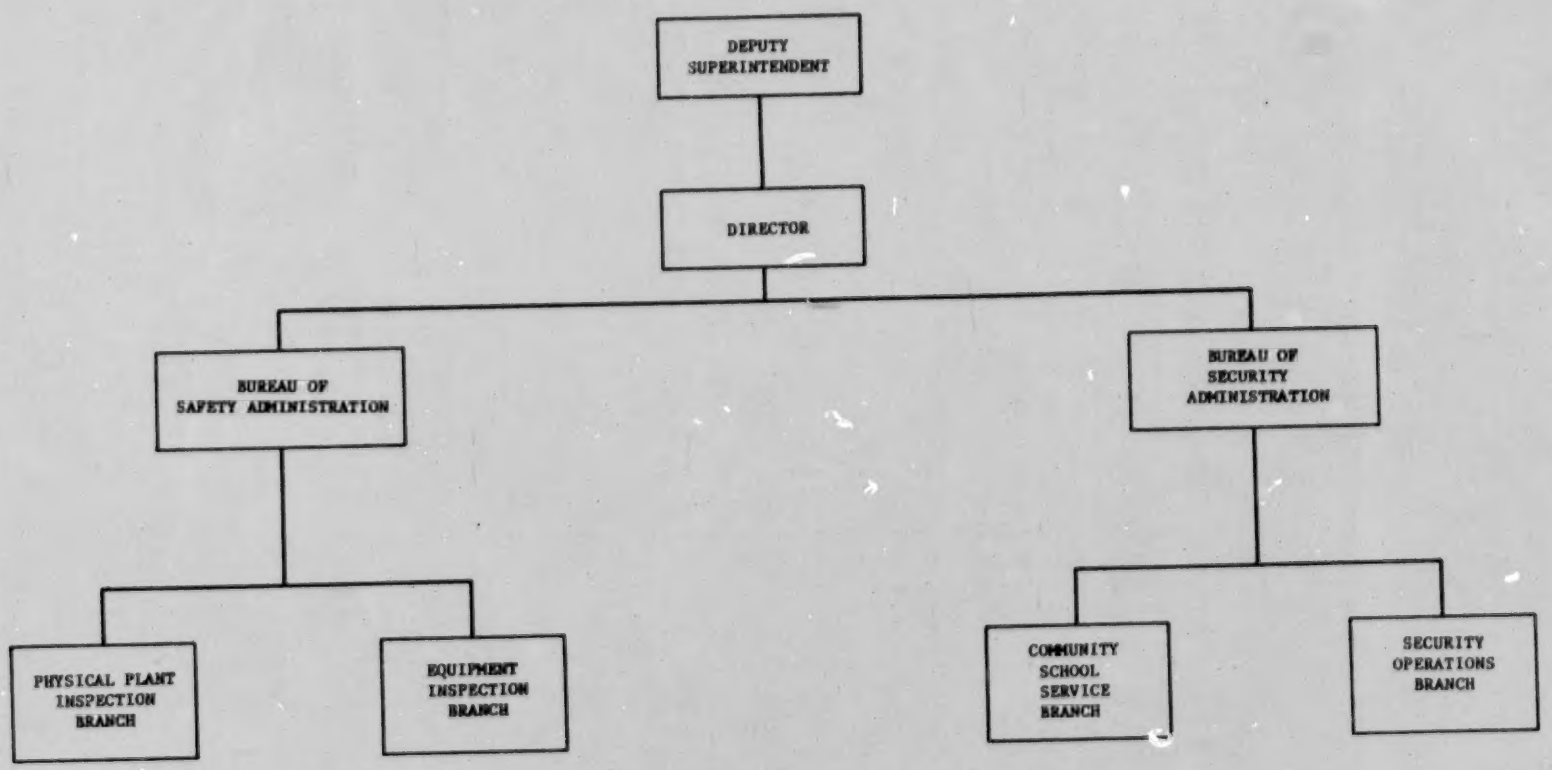


EXHIBIT XVI-A

ORGANIZATION AS OF
MAY, 1974

DIVISION OF SECURITY AND SAFETY



BUREAU OF LABOR RELATIONS

It is proposed that Labor Relations be separated from Employee-Employer Relations as indicated in the statement on Employee-Employer Relations.

Since contract negotiations covers the full range of concerns in the system, it is felt that this function should be related directly to the Superintendent/Vice Superintendent, as opposed to an in-between reporting agent.

The recommendation is that the position of Special Assistant or Executive Assistant for Labor Relations be established in the Office of the Superintendent/Vice Superintendent, with support staff as shown in Exhibit XVII.

The major responsibilities of the position would be as follows:

- Overall responsibility for the negotiations and management advisory functions in the area of labor relations

- Serve as Chief Negotiator and spokesman for the Board of Education in meetings, conferences and bargaining sessions with organizations representing various employee groups of the District of Columbia Public Schools

- To develop the Board of Education's position on all demands submitted by employee organizations submitted both during negotiations and during the year

- Administer and interpret all agreements that are negotiated with employer organizations. Provide advice, assistance and implementing instructions on negotiated agreements to school officers and supervisors

- Conduct workshops for school officers and supervisors on negotiated agreements and other aspects of labor-management relations

- Review proposals to be submitted to the Superintendent or the Board of Education from various school offices to insure that such proposals are not in conflict with any negotiated agreements or employer-employee principles

- Research of precedents, trends, practices, laws, regulations, decisions, contractual agreements; development of statistics; preparation of reports and analyses of factual data

- Represents the Board of Education and the General Superintendent of Schools in collective negotiations with recognized employee groups, and implements, in conjunction with appropriate staff, the collective negotiations agreements which are in effect with employee groups

- Assists in the administration of the grievance procedures

- Assists in the resolution of all employee relations problems

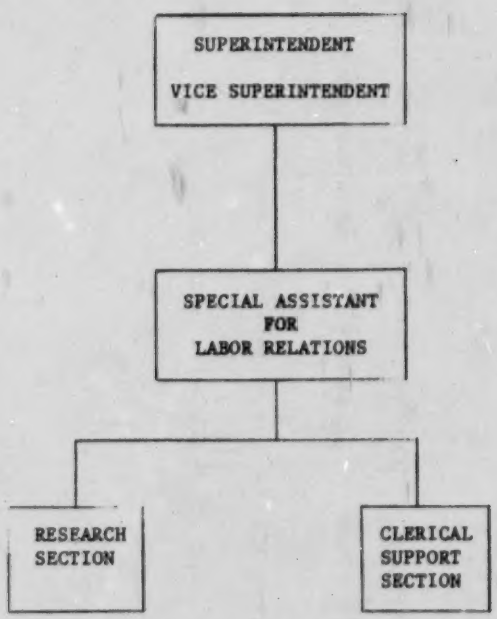
- Acts as the Superintendent's representative in final steps of grievance and arbitration procedures

- Assists the General Superintendent of Schools in the discharge of selected administrative activities

PROPOSED ORGANIZATION
AS OF MAY, 1974

BUREAU OF LABOR RELATIONS

EXHIBIT XVII



DIVISION OF OPERATION SERVICES

The need to bring together those functions which concern themselves with the day-to-day operational aspects of the school system dictate the creation of a replacement division for the former Division of Buildings and Grounds and Division of Logistical Support.

The supporting organizational structure of the Division of Operational Services is shown in Exhibit XVIII with the responsibilities of the division being:

- Directs all custodial, heating, and grounds operations
- Plans a comprehensive grounds and buildings maintenance program
- Insures that facilities are kept in good repair
- Develops and operates a routine maintenance program and a preventative maintenance program
- Develops landscape projects for facilities
- Works cooperatively with the Safety Section in the development of safe practices and training sessions for safety purposes

- Reviews engineering reports and makes recommendations to the Division of Facilities Planning
- Provides for disposal of trash
- Provides for pest control
- Provides for landscaping of grounds
- Researches and develops materials and methods pertaining to the maintenance of physical facilities
- Establishes and maintains a centrally located repair facility
- Provides repair services that will minimize disruption to the educational program
- Provides routine maintenance of equipment on a scheduled basis
- Establishes and maintains contact with the authorized service agencies to assure service for major repairs
- Participates in in-service training seminars provided by manufacturers

- Works cooperatively with the Division of Facilities Planning in evaluating new equipment based on repair experiences

- Works cooperatively with the educational staff in standardizing equipment to lower repair costs

- Maintains inventories of repair parts and servicing equipment

- Provides for procurement of educational supplies and equipment

- Prepares specifications and determines items to be purchased

- Works cooperatively with the Staff Development Office in conducting workshops for office staff

- Prepares procedures and circulates Annual Requisitions instructions necessary for procurement of instructional materials and equipment

- Works cooperatively with the Division of Data Processing to establish automated systems for purchasing and inventory needs

- Administers and monitors the warehousing and distribution of materials and equipment
- Maintains proper inventories of instructional materials and equipment
- Evaluates new equipment and recommends standardizing of equipment
- Plans and manages the school lunch and breakfast programs
- Prepares menus and orders food and supplies
- Stores and distributes foods
- Evaluates foods by conducting laboratory tests
- Provides for training programs for staff in all offices under the Division of Operations
- Works cooperatively with Regional Superintendents and the Director of the Division of Facilities Planning in designing and equipping cafeterias or dining areas and new facilities
- Works cooperatively with the Controller in all matters involving the acquisition and use of funds and in accounting for them

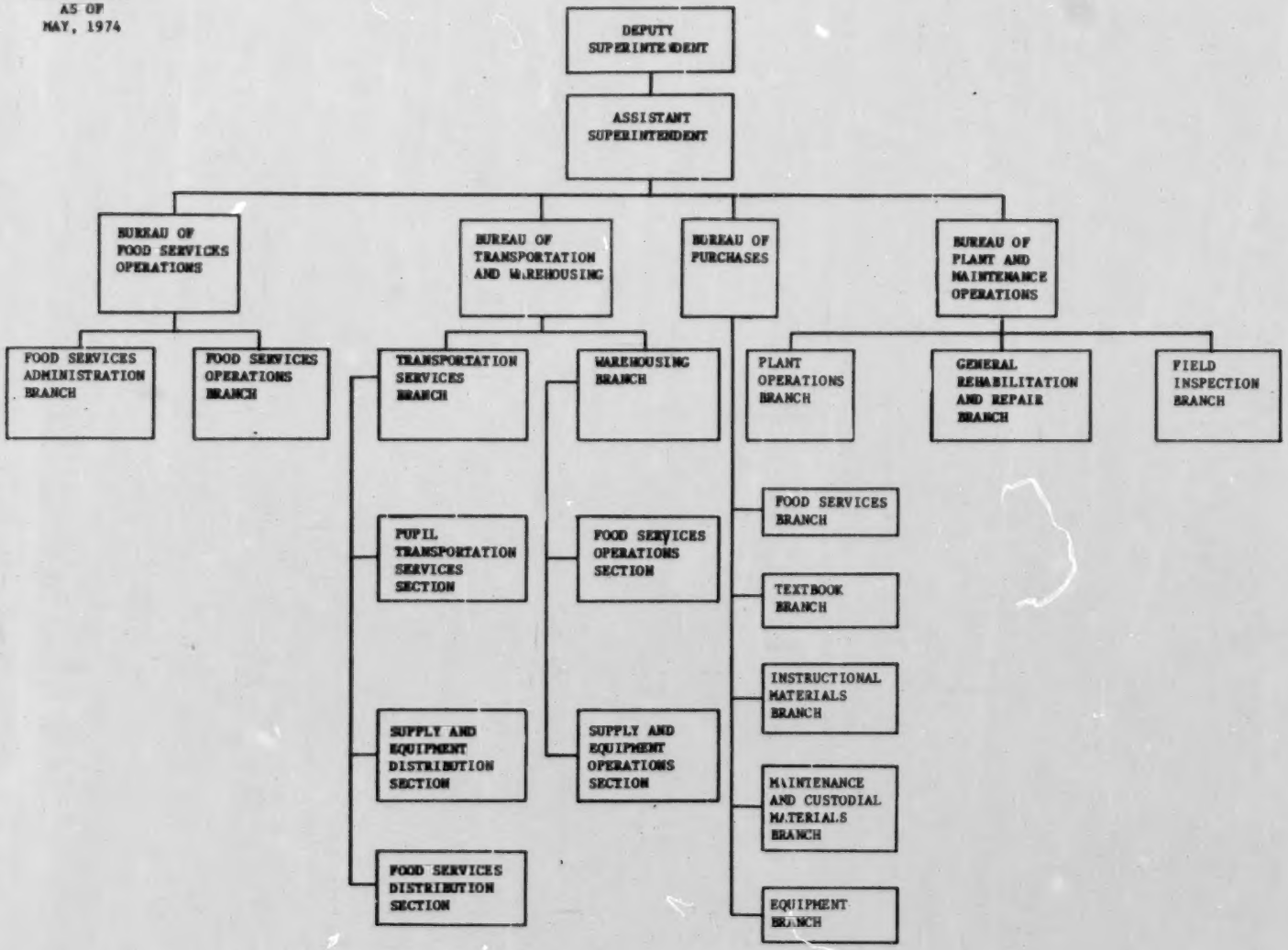
- Administers and monitors the school bus program
- Provides transportation services for handicapped children
- Provides transportation for athletic teams, cultural enrichment and for other special programs
- Establishes bus routes for regularly scheduled services
- Assigns and monitors the use of vehicles owned by the school system
- Registers and licenses vehicles
- Provides for training for drivers as required by the District of Columbia Codes
- Works cooperatively with the Staff Director of the Safety Section in providing safety training and safe practices procedures
- Evaluates drivers on a regular basis
- Takes appropriate action in relation to accident records and other traffic violations

- Operates, equips, and staffs vehicle repair facilities
- Maintains service records of vehicles for periodic scheduling of preventive maintenance
- Makes mechanical vehicle repairs as required
- Maintains an inventory of parts and equipment needed for repairs of vehicles
- Makes recommendations for replacement of vehicles
- Determines need and requisition of equipment and vehicles
- Provides for the distribution of food as required

DIVISION OF
OPERATION SERVICES

EXHIBIT XVIII

ORGANIZATION
AS OF
MAY, 1974



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BUREAU OF OFFICE SERVICES

There is a need for a combined Office Services Unit to support the many clerical needs that are presently scattered throughout the building.

Presently, specialized functions that are needed for many divisions cannot be performed due to the limited amoung of funds for specialized equipment. Yet some specialized equipment that has been secured by single divisionc sits idle for long periods.

Additionally, because of fragmentation and proliferation of equipment throughout the building, excess costs are being paid for duplicate reproduction facilities -- an example being the amount paid for xerox machines.

There are needs in the following areas:

- micro-filming
- printing and publications
- microfiche
- word processing
- xeroxing
- duplicating
- inventory records control
- expanded mail service
- photographic reproductions

The central office is a high volume producer of printed information which must be circulated to the field or fowarded to funding agencies. This creates an inequity of work during peak output periods, causing an inefficient use of staff and perhaps excess staff time in individual sessions.

To establish an organization to meet the clerical needs of the central administration and the Board of Education, equipment and personnel now scattered throughout the central office that is marginally used would be gathered under a single auspices, thus expanding the capacity of the present unit.

The unit would become responsible for the overall clerical support needs of the central staff, including final preparation of proposals, voluminous reports, curriculum guide reproduction, budget production and distribution.

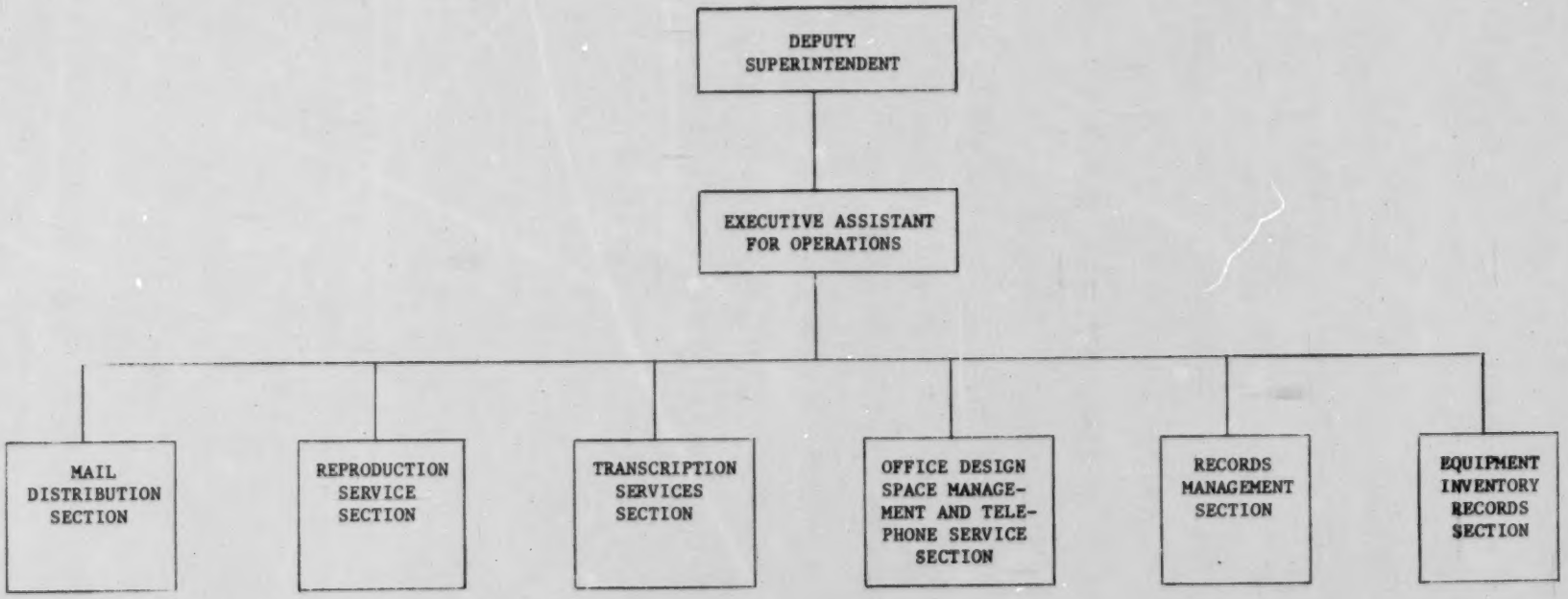
To assure efficiency of the operation, production requests would be managed and scheduled in order to assure delivery of a product in order to meet time requirements.

Due to the close relationship of produced materials and distribution, an expanded mail service will be part of the overall Office Services Operation. The organizational structure is detailed in Exhibit XIX.

ORGANIZATION AS OF
MAY, 1974

BUREAU OF OFFICE SERVICES

EXHIBIT XIX



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DIVISION OF FACILITIES PLANNING

There has been demonstrated a continuing need for short- and long-range planning in the Capital Outlay area, as well as the need to produce accurate demographic data for the District of Columbia so that adequate planning takes place in order to assure providing adequate facilities.

Aside from the need to provide a facility, facilities have to be provided on the basis of planned educational use. In order to bring about the marriage of educational program planning, hardware to be used, buildings to be provided, and all of the related needs to put the planned educational program into operation, a Division of Facilities Planning is to be organized, partially from new funds requested in the FY 1975 budget and drawing appropriate staff from the former Division of Buildings and Grounds.

The new division will be structured as shown in Exhibit XX.

The responsibilities of the Division of Facilities Planning are:

- Evaluates and researches on a continuing basis the basic facilities requirements of the District of Columbia
- Develops detailed area studies which provide the basis for short- and long-range facilities planning

- Works with the Regional Superintendents to establish and adjust school attendance boundaries
- Coordinates with and interprets the recommendations for short- and long-range facilities programs from the Department of Planning of the District of Columbia Government and other related units
- Coordinates long-range, middle-range, and short-range facilities plans with plans developed in the Division of Research, Planning and Evaluation to insure that facilities are available to implement educational programs
- Coordinates the development of educational specifications to meet the educational needs of each local community in the city
- Provides furniture and equipment specifications for new building facilities and others when required
- Establishes procedures for the development of site specifications, selection, and purchase
- Evaluates the effectiveness of facilities planning activities for the schools

- Provides up-to-date computerized facilities inventory reports

- Develops demographic data and information pertinent to enrollment projects

- Assists in the selection of architects, architectural supervision, and construction supervision

- Evaluates facilities sites recommendations of the Regional Superintendents for consistency with long-range plans; based on this evaluation, recommends facility sites

- Provides professional assistance to staff members in developing new facilities programs

- Participates in the development of the budget

- Meets with and provides information to appropriate District of Columbia agencies

- Meets with regional staff and their community representatives

- Meets with local committees for discussion of facilities, attendance areas, needed relocations, and finance

- Provides administrative and technical services to other divisions

- Provides facilities planning information to the Board of Education

- Attends community meetings to discuss matters related to facilities and boundaries

- Disseminates reports on basic facilities requirements, detailed area studies, school attendance boundaries, and demographic data to school staff and the public

- Meets with the Department of General Services Administration of the District of Columbia to coordinate architectural and construction supervision

- Prepares furniture and equipment specifications for submission to building contractor

- Determines, in cooperation with the Division of Planning, Research and Evaluation, the long-range facilities needs
- Translates educational goals into facility programs
- Communicates with the community with respect to planning schools and related facilities
- Ensures skilled site-evaluation
- Coordinates activities required for site acquisition
- Prepares analyses and recommendations for the selection of architects
- Directs programmatic reviews of architectural drawings and specifications
- Coordinates and monitors the activity of the architect through the various design phases in planning a project
- Provides the architect with technical assistance in developing plans and specifications for school projects

- Coordinates and monitors the construction phase of the project

- Periodically inspects buildings to ensure compliance with plans and specifications

- Evaluates completed projects in cooperation with the Department of General Services Administration of the District of Columbia Government

- Provides technical reviews of architectural submittals

- Conducts the final inspection of each completed facility before acceptance

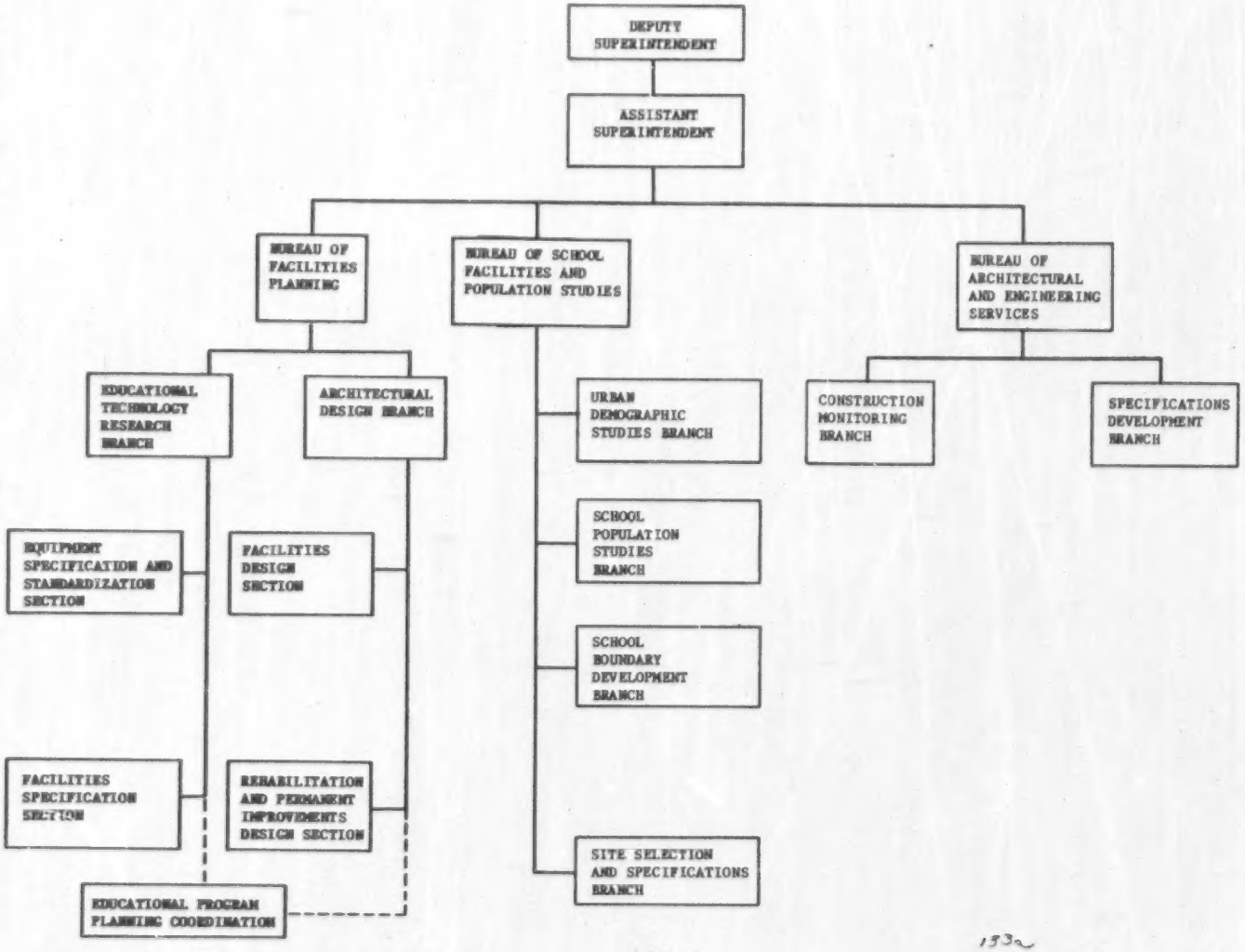
- Serves as liaison to agencies as required

- Ensures that design and construction is in compliance with local codes

PROPOSED ORGANIZATION

EXHIBIT XX

DIVISION OF FACILITIES PLANNING


DEPUTY SUPERINTENDENT
ASSISTANT SUPERINTENDENT
BUREAU OF FACILITIES PLANNING
BUREAU OF SCHOOL FACILITIES AND POPULATION STUDIES
BUREAU OF ARCHITECTURAL AND ENGINEERING SERVICES
EDUCATIONAL TECHNOLOGY RESEARCH BRANCH
ARCHITECTURAL DESIGN BRANCH
URBAN DEMOGRAPHIC STUDIES BRANCH
CONSTRUCTION MONITORING BRANCH
SPECIFICATIONS DEVELOPMENT BRANCH
EQUIPMENT SPECIFICATION AND STANDARDIZATION SECTION
FACILITIES DESIGN SECTION
SCHOOL POPULATION STUDIES BRANCH
SCHOOL BOUNDARY DEVELOPMENT BRANCH
FACILITIES SPECIFICATION SECTION
REHABILITATION AND PERMANENT IMPROVEMENTS DESIGN SECTION
SITE SELECTION AND SPECIFICATIONS BRANCH
EDUCATIONAL PROGRAM PLANNING COORDINATION

THE FACILITIES PLANNING PROCESS

The basic assumption upon which the development of the facilities planning process proceeds is that the effective planning, completion, and evaluation of educational facilities by the District of Columbia Public Schools must be based upon identified requirements of educational and technical staff and the meeting of these specified requirements within the resulting facility.

The development of a facilities planning process must create the framework within which effective educational facilities are designed, constructed and put into use. The major functions of the facilities planning process are:

- to provide procedures through which the elements of an educational program for a particular situation are communicated to the facilities planning division for determination of the technical implications of accommodating a planned program

- to provide the procedures through which educational staff delineates the educational program to be accommodated in a facility

- to provide the procedures for interaction for the purpose of evaluation of proposed educational programs and related facility designs by educational research and facilities planning staff

- to provide the procedures through which technical analysis of the physical properties can be evaluated to accommodate the described educational programs

- to provide the procedure for transmittal of accumulated city demographic data; school population studies information; and up-to-date facilities design and equipment standards

As a result of the functions performed by the facilities planning process

- new facilities will be built to accommodate anticipated educational programs

- buildings will be designed, constructed and rehabilitated based upon requirements for proposed educational programs

- the short-range goals of the school system can be met while simultaneously advancing toward accomplishing the school system's long-range goals

To implement the facilities planning process

- an educational component will be established within the Office of Educational Programs and Services
- a facilities planning division will be established in the Office of Management Services
- staff will be designated within the Office of Planning, Research and Evaluation

The facilities planning process relies on the systematic interaction of all of the above components and

- depends upon the development, presentation, and response by appropriate participants within the process in relation to the information required for completion of a particular project

In order to carry out these responsibilities, the educational component is required to provide an Educational Program Outline which consists of an explanation of the details of the educational program for which a new facility is to be developed.

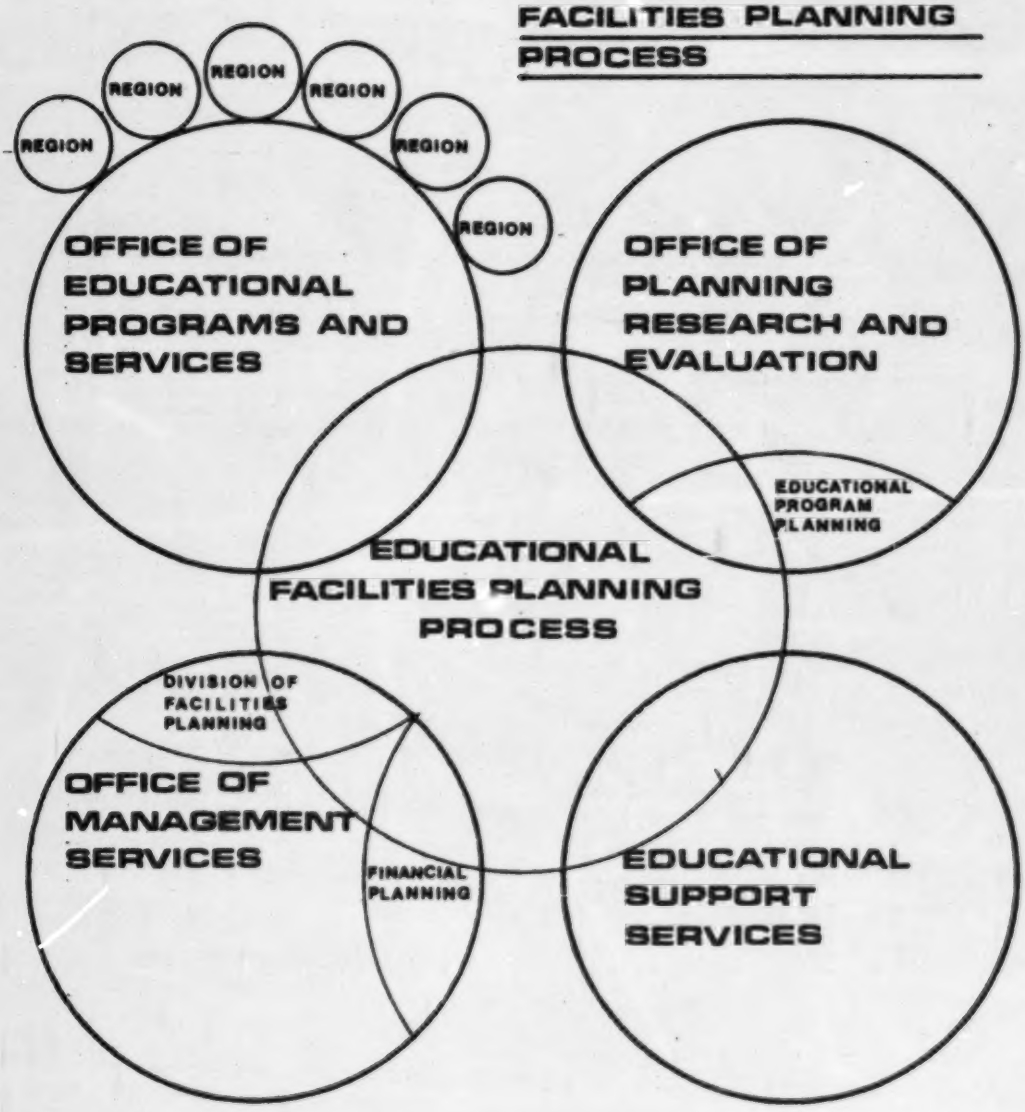
The Division of Facilities Planning would review the educational specifications and detail the physical implications for accommodating the proposed educational program in a new or redesigned facility.

The staff of the Office of Planning, Research and Evaluation will

- interact with educational staff and Facilities Planning Staff at each step of the planning process
- participate in the decisions of the facilities planning process to insure compatability with the educational goals of the school system
- participate in revisions of the decisions of the facilities planning process as determined by the results of the joint assessments of proposed and planned facilities

EXHIBIT XXI

THE EDUCATIONAL FACILITIES PLANNING PROCESS



SCHEMATIC DIAGRAM OF THE NECESSARY INTERACTION BETWEEN COMPONENTS OF THE SCHOOL SYSTEM

PART VI

IMPLEMENTATION AND CONCLUSION

IMPLEMENTATION - CONCLUSION

The implementation of the reorganization of Management Services is intended to streamline the total support structure for the efficient delivery of services to the entire school system.

The reorganization structure presented as part of this package defines the basic organizational structures needed in each area from which services emanate.

In order to become an effective and viable unit, additional work and planning is needed to further delineate to the lowest level, position responsibilities and specific staffing needs for each division, bureau, branch and section.

The implementation of this organizational structure is meant to cut the red tape and reduce reaction time; provide service where none presently exists; eliminate manual operations which can be automated; and provide for system growth in the area of providing pertinent data base and basis for decision making.

Movement into the organizational structure as outlined must occur in phases.

Phase I will consist of physical realigning of existing staff. Phase II and subsequent phases will provide for job reclassification and personnel retraining to assume new identified responsibilities,

as well as the transfer of non-management personnel performing management functions in operating divisions.

It is expected that one immediate result of physical reorganization will mean the elimination of excess positions in some areas, and creation or transfer of those positions to other divisions where personnel, based on background, can be retrained to assume different functions. Additionally, massive reclassification of existing positions which are improperly classified will be reviewed and retitled.

The major areas of immediate personnel additions are for the Division of Data Processing and Systems Design and the Division of Control. Both of these divisions have need of specialized personnel which may not be available in positions that will no longer be needed as the system moves to modernization and automation.

All of the reports cited -- the Passow Report, the Nelsen Committee Report, the Price-Waterhouse Report, the Management Review Report -- identified areas of deficiency in the managerial operation of the school system and made sweeping recommendations for reorganization as listed within the body of this submission.

The comprehensive assessment that has been undertaken by the Deputy Superintendent of Management Services has resulted in

the preparation of this realignment and reorganization for the management offices in order to provide for an effective and efficient management operation.

However, as it is well known, available Board of Education resources are not presently sufficient to bring about swift implementation of the ultimate goals set forth here. For this reason, in addition to reprioritizing some internal resources, the resources of outside business and civic organizations are needed to assist in the implementation of a revised management operation.

Specifically, a need exists for the application of expertise in:

- the design of data systems and procedures
- the area of automation of warehousing and purchasing processes
- the automation of the financial monitoring and report preparations
- the design and implementation of a personnel/payroll accounting system
- development of operating procedures for the Divisions of Budget, Finance, Personnel and all management-related departments

- development of job descriptions and work-flow procedures

- evaluating, recommending and assisting the Deputy to put into place the initial operation of the new procedures

- assisting in staff evaluation and helping to conduct searches for new permanent staff as required by the revised organizational structure

A prolonged study with the issuance of the report is not required. The need is more for a study-implementation type of assistance. For this reason, the Deputy Superintendent envisions that manpower with technical skills in the area of accounting, systems analysis, systems design, and managerial planning as being the key personnel needed to assist in putting the District of Columbia Schools management operation on a sound and modern footing, pending addition of permanent staff to maintain on an on-going basis developments in these areas.

The needs can be generalized in terms of the feeling of a vast obligation to bring the District of Columbia Public Schools to a modern operating level, utilizing the latest techniques available. It is the feeling of the Deputy Superintendent that

the key to the updating and improvement of management lies in the improved use and the development of expanded computer technology and technical know-how within the managerial offices of the school system.